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ABSTRACT

Summaries and edited transcriptions document the major content areas addressed by the institute, which exposed state teams to innovative continuing education concepts and methodologies to apply in state planning for continuing education through a week-long workshop and postworkshop, follow-up meetings and communication, consultation, document exchanges, and reference service for state teams throughout the year. Presented papers include "Planning Models," by Brooke E. Sheldon; "Managing the Statewide Continuing Education Process" by John A. Bachman; "Evaluation," by Muriel Howick; "Continuing Education Delivery Systems," by Margaret K. Goggin; "CLENE Voluntary Recognition Service," by Micki Jo Young; "Western Council of State Libraries," by Anne Marie Falsone; "Status of State Planning for Continuing Education," by Mary Baxter; and "Perspective from a Seasoned Project Director," by Elizabeth W. Stone. Summaries are provided of postworkshop meetings on these topics: "Self Assessment and Learning Contracts," "Educational Application of Satellite Technology," and "Hitherto and Henceforth: Making Tomorrow Happen." Appendices include an announcement brochure and postworkshop agendas, as well as lists of institute participants and contributors. (LMM)

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PLANNING FOR
STATEWIDE CONTINUING EDUCATION
FOR
LIBRARY-INFORMATION-MEDIA PERSONNEL

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A REPORT of the 1979-1980

"STATEWIDE SYSTEMS OF CONTINUING EDUCATION:

NEW DIRECTIONS INSTITUTE

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Title II-B
U.S. OFFICE OF EDUCATION

The Catholic University of America
Graduate Department of Library and Information Science
and
Continuing Library Education Network and Exchange
620 Michigan Avenue,N.E., Washington, D.C. 20064
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PLANNING FOR STATEWIDE CONTINUING EDUCATION FOR LIBRARY·INFORMATION·MEDIA PERSONNEL

. . . .

A REPORT of the 1979-1980
"STATEWIDE SYSTEMS OF CONTINUING EDUCATION"
NEW DIRECTIONS" INSTITUTE

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Graduate Department of Library and Information Science
and
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620 Michigan Avenue, N.E., Washington, D.C. 20064
1980

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PREFACE

The staff of the 1979-1980 "Statewide Systems of Continuing Education: New Directions" Institute is issuing this report to members and institutions of the library community seeking strategies for statewide planning of continuing education.

This document reports major content areas addressed through the 1979-1980 "Statewide Systems of Continuing Education: New Directions," an Institute designed to give emphasis to *statewide* planning and coordination of continuing education.

Continuing education programming, *per se*, was not addressed by the Institute, nor is it the focus of this report. The concentration of interest is on planning and management of continuing education for library-related personnel in the United States and U.S. territories.

1979-1980 INSTITUTE BACKGROUND

The 1979-1980 Institute grant was announced to the Chief Officers of State Library Agencies (COSLA) in June 1979. The major goals for the Institute were:

1) to facilitate the development of statewide coordinated systems of continuing education for personnel in the library-information-media professions.

2) to expose state teams to innovative continuing education concepts and methodologies to apply in state planning for continuing education.

These goals were achieved through a major week-long workshop and postworkshop follow-up meetings, and communication, consultation, document exchanges, and reference service for state teams throughout the year.

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Participation in the Institute provided a leadership training activity for the state team participants. Participants were nominated by the Chief Officer of the State Libraries and represented:

1) the State Library

2) library information·media·education in the state

3) the state's library·information·media professional associations

The 1979-1980 Institute selection criteria gave priority to states in the Western United States, because few Western states had participated in previous institutes held in Illinois and New York.

The subject content summaries and edited transcriptions which follow are derived from 1979-1980 Institute experiences. The principle source is the transcription or summary of sessions held during the major workshop in Santa Fe, New Mexico, November 8-13, 1979. Topics covered during the postworkshop meetings in conjunction with the American Library Association Mid-Winter Meeting on January 21, 1980 and the meeting held in conjunction with the annual meeting of the Association for Educational Communications and Technology on April 22, 1980 are also included in this report.

ACKNOWLEDGMENTS

Sincere gratitude and appreciation go to the following persons associated with the Institute:

The Advisory Board, which functioned as a "working" board for no financial compensation other than reimbursement for travel expenses to a week-end planning session in July 1979 and the week-long workshop in November, 1979.

Members of the Advisory Board functioned in leadership roles during the workshop and participated actively in the planning process prior to the workshop. Additionally, individual members provided guidance and advice to the Institute staff throughout the Institute year.

Serving on the Advisory Board were:

Clifford E. Lange, Chairman, State Librarian, New Mexico State Library; Anne Marie Falsone, Assistant Commissioner, Colorado State Library; Bernard Franckowiak, Dean, Graduate School of Librarianship and Information Management, University of Denver; Johnnie Givens, Research Associate, Metrics Research Corporation, Atlanta, Georgia; Margaret Goggin, Professor, Graduate School of Librarianship and Information Management, University of Denver; Carmela Ruby, Library Consultant, California State Library.

Ex-officio member of the Advisory Board, *Karen Watkins, Continuing Education Consultant, New Mexico State Library,* deserves a special thanks for her role as local arrangements liaison in Santa Fe. *Dr. Clifford E. Lange, State Librarian and Chairman of the Advisory Board,* and host of the Santa Fe Workshop, gave "advice and consent" for *Karen Watkin's* invaluable assistance.

Kathleen Weibel, Continuing Education Consultant, New York State Library, Cultural Education Center, and ex-officio member of the Advisory Board, developed a workbook distributed during the Santa Fe Workshop entitled, *1979-1980 "Statewide Systems of Continuing Education: New Directions" Planning Workbook and Discussion Guide.* Her workbook is practical and useful for planners of statewide continuing education.

James Nelson, President of the Continuing Library Education Network and Exchange (CLENE), and ex-officio member of the Advisory Board, participated actively in the Santa Fe Workshop and has given his personal support to Institute activities throughout the year.

Mary Baxter, Research Associate, and Carolyn Hardin, Project Secretary, have been resourceful and loyal persons with whom to work during the Institute experience. With all project personnel being part-time, communication and cooperation have been especially important in carrying out the staff duties

and responsibilities for the Institute. *Mary and Carolyn* have exemplified the "cooperative spirit" *par excellence*. *Dr. Elizabeth W. Stone, Project Director,* provided dedicated guidance, oversight and enthusiasm to the staff, Board, and participants throughout the year. There would be no Institute experience about which to report if it were not for Betty Stone and our U.S.O.E. project officer, Frank Stevens. Thank you all, for all you have done.

Eleanor Lynch Biscoe
Program Director
June, 1980

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INTRODUCTION

This document represents a year's worth of effort on the part of many people, both Institute staff and Institute participants. One always hopes to be able to look back with satisfaction on an activity in which one has participated. It is a pleasure to have that disposition as I reflect upon the Institute year and what has been accomplished. It is clear that the Institute goals have been met, as you will discover after reading this document.

In my own state, New Mexico, a plan has been developed, an advisory council established, and work is underway toward a functioning and effective statewide system of continuing education. This has occurred in other states as well. Progress is being made!

Clearly, a foundation for continuing education for personnel in the library·information·media profession is being made through Institute efforts of this scope. We will not survive without that crucial support for continuing education.

It has been a pleasure for me to be associated with the many fine people involved in this Institute. I want to thank all of you for your hard work and your willing cooperation, both of which have made this year a success.

Clifford E. Lange, Ph.D.

State Librarian of New Mexico
Chairman, 1979-1980 Advisory Board
"Statewide Systems of Continuing Education: New Directions"

CONTINUING EDUCATION IN CONTEXT

by *Roderick G. Swartz*
State Librarian
Washington State Library

Mr. Swartz gave the keynote remarks at the Institute workshop in Santa Fe. He strongly advocated the principle of integrating continuing education planning into the development and implementation of statewide library development efforts. In addition, he put the onus of responsibility on professionals to pursue individual continuing education to update their basic library education.

The title of the talk scheduled here is "Continuing Education in Context." I would like to paraphase that and talk about "Continuing Education in My Context," and share my own prejudices and concerns about continuing education. You will have to take my talk in context with what else you hear this week.

I would like to talk in several different areas: a bit about our profession; the role of continuing education in that profession; the role of the individual and the institution in developing continuing education requirements; and, finally, the need for a statewide plan in the provision of continuing education for our profession.

A few years ago, Pierce Butler wrote that librarianship really was not a profession, and itemized what the problems were in that regard as a profession. Let us take another definition of professional by Robert Merton, examine that definition and then relate it to continuing education.

Merton's definition placed value on: 1) special knowledge and the intellect - that is, "knowing"; 2) the value placed upon special skills in a trained capacity - that is "doing"; 3) the value placed upon combining this knowledge and doing in the way of serving others - that is, the special and social responsibilities that a profession has.

Certainly "knowing", the specialized knowledge and intellect, has a direct relationship to continuing education. Basic education is just not enough.

Even if we realize that basic education is not enough, it does not always lead to continuing education. Many times the blame turns back to the university, to the library school from which we got our master's degree, and not turn towards ourselves. The following is one professional's frustration over the fact that basic university education had not sustained him over the years:

> In the first five years after graduation, alumni said that they should have been taught more practical techniques; the next five years, they say that they should have been given more basic theory; in the tenth to fifteenth year, they inform the faculty that they should have been taught more about administration, or about their relations with co-workers and subordinates; in the subsequent five years they condemn the failure of the professors to put the profession in its larger historical, social and economic context; after the twentieth year they insist that they should have been given a broader orientation to all knowledge--scientific and human. Some time after that they stopped giving advice, the university had deteriorated so badly since they left, it was beyond hope!

There is certainly a role and an argument for continuing education--a third of our profession, the "knowing" aspect of it.

Let us look for a minute at the "doing" aspect of a professional. Here, I would like to touch on two areas. First, is the whole area of the librarian-client relationship. The concept of the professional librarian is that we prescribe to the client what is needed in information, in health care, in legal advice. We are in a changing environment now with regard to the trust and confidence level that people have with a profession.

Let me give you a personal example. I have had some dental work done recently. Up until several years ago, you went to the dentist, you were told what was needed, and you accepted it. Not this time. I went to another dentist for a second opinion. With the explosion of information, all of us feel we are expert in many areas, especially in relationships to the professions with which we deal. There is a growing responsibility there--for librarianship as well as other professions--in recognizing the changing profesional-client relationship.

The other point under the "doing" is that many professionals move from dealing with the client into other areas such as management, data processing, politics, and public relations. These areas are not in the basic education for librarians. You either learn them through a continuing education program, or you learn them through the "school of hard knocks." Let me assure you, it is better to learn these through the former rather than the latter.

Finally, let us look at the special or social responsibilities, combining the "knowing" and the "doing" to work in the service of others. In this area, I had an interesting experience about six months ago. I was having dinner in Chicago with a young profesional librarian--who seemed about to leave the profession--very disillusioned, very discouraged. I found that my arguments were really pretty simple, and they were two-fold: 1) information has an impact; 2) if you accept that, there has to be full and free access to information, and this is important. This is what our profession is all about--the "knowing and doing" in the service to others.

A profession, then, has a need for continuing education in all three parts of the definition: the "knowing," the "doing," and the two combined in the service to others--the social and special responsibilities. The real responsibility for a continuing education program is up to the individual professional.

The best individual continuing education program of an individual that I have seen came from a data processing manager that I hired recently. One of the things that impressed me most about the resume was a two and a half page individual program of continuing education from his bachelor's degree, up to the month before he was hired. Despite all the pressures he has had since he has been with us, he has continued that program. The responsibility is really up to the individual.

Next, let us look at the role institutions play in continuing education. First, the employing institution has a responsibility not only for staff development, but also for the continuing education and the growth of the individual.

Secondly, the library school certainly has a responsibility. As you work through your state plan, its importance will depend on whether or not you have a library school in your particular state. In Washington, we are fortunate to have a library school. One of the things that the school has been able to do is to develop a telecommunications network--called WETNET--for information exchange, and we will be using it to hold continuing education programs for librarians later this year.

Third is the library association. Two things bother me here. The library association usually attracts our professionals, as opposed to everybody who is associated with a library. When I talk about continuing education programs, I am concerned about everybody who works in a library. The second thing is that the association probably attracts only a percentage of the professionals.

Let me read you a quote which emphasizes what I mean.

> We suspect that a significant hallmark of the librarian who functions as a true profesional is reflected in the nature of his or her relationships. The professional constantly expands upon the circle of contacts and reinforces and strengthens existing colleague relationships, pursuing an active role by continuing growth through self-study and associating himself with a wealth of regional and national activities in librarianship and in other special disciplines with which his work puts him in contact. For that individual, keeping up with professional trends and advances through the journals and monographs, is a matter of fact. To loose touch with current affairs would make him feel as uncomfortable and ill-equiped professionally as to remain out of touch with broader societal affairs would render him uneasy as a generally aware person in his society. This is in contrast to the librarian who is confining his relationships to those who are merely comforting, reassuring and reinforcing of his prejudices and limitations.

I think that that paragraph, more than anything, describes to me what a professional association is all about. But it still does not catch everybody into that loop who needs to be involved in continuing education.

Finally, I come to the state library. I think that it has a unique role as a catalyst for any statewide activities. Whether you choose this agency or one of the above as a continuing education leader in your state, they should be active in the following areas.

First, individual professionals need to realize that a continuing education personal plan is needed. Certification, if it includes some type of continuing education requirements,

might be a good nudge to the professional who is not about to put to put together a professional continuing education program. The argument on the other side is that you will never be able to create an environment for that individual who lags behind. If that individual is required to put a program together, it will not be one that enhances that individual's capabilities.

Secondly, I think that the state library, or the lead agency that you select for your state has a responsibility to coordinate forces to identify needs, begin to plan, and put the plan into operation. (I am not going to talk much about needs assessments. There are too many continuing education programs that did needs assessments and then stopped. There was never any follow-up, any program development.)

The next step is to develop that plan--that framework and roadmap--into a program of work. I see a continuing education plan as part of a statewide development program. It is not only a continuing education program, it is an approach to improve service, as well as the opportunity for the professional to improve skills.

Let me give you an example. We have a computerized bibliographic system in our state. As we installed this system across the state, we found that different libraries do different things with it. In some libraries it is an add-on to what they do already. In other libraries, it is a different way of doing business. They bring it in, add it to a continuing education program to introduce that system as a different approach to librarianship. The important factor is to train people to utilize this service in the way it was designed, as opposed to just adding a new service for that library.

Let me give you another example. We have seven library service areas, in which we encourage multi-type library development. We have used continuing education experiences, not only to strengthen the individual professionals in that area, but to strengthen the library service areas and the multi-type library contacts.

Four, the lead agency has a responsibility to encourage the exchange of continuing education packages and opportunities statewide, regionally and nationally. We have a publication called *Password*, which gets the word to public, academic, school, and special libraries. A major component of that publication is a continuing education calendar which makes people in the state aware of available continuing education opportunities.

The final point is recognition to encourage the professional to participate in the continuing education process. In my office at home, my basic education recognition forms are on the wall. The certificates and scrolls from my continuing education experiences, I think, are in the bottom drawer in the desk. In my mind, there has to be some other kind of stimulation to participate in continuing education.

I can hear you saying to yourself: "We are supposed to coordinate the planning process, we are supposed to give the impetus to the individual professional to take advantage of all these opportunities, and if we are really professionals we had better get busy and plan our own individual continuing education program. How are we ever going to find time to do all that?"

I do not really have that answer, but I could give you a couple of illustrations. One comes from a former president of the Case Institute of Technology who states:

> Every calling has its mild compulsion, its daily round of tasks, its standard of honest craftsmanship, its code of one-to-one relationships which must be covered if one is to survive. Beyond that lies the mile of voluntary effort where men strive for excellence, give unrequited service to the common good, and seek to invest their work with a wide and enduring significance. It is only in this second mile that a calling may attain to the dignity and the distinction of a profession.

The other reply is some advice given to a doctor who was complaining about the workload required of him. He was told that a doctor has to work 18 hours a day and seven days a week. If you cannot console yourself to this, get out of the profession.

It is somewhere in that second mile or that eighteenth hour that we probably do become truly professional; that we take time for the important things in our profession, including continuing education. It does take long sessions sometimes, it takes evenings, weekends, or time away from home--as you are doing here--to make it successful.

A keynoter is supposed to establish the keynote for what you accomplish during a meeting. You talked about three S's

last night--*Prescription for Situation Downtime: Colleague SSS*"--let me talk about three C's this morning. First it will take *cooperation* among the institutions and agencies and associations in your state to make the plan succeed. It will take *coordination*--someone has to take the lead in your state to see that your continuing education plan is tied in with your statewide development plan. Finally, it requires *completion*. You can't go home satisfied that once you have got the plan on paper, you've really accomplished your full task. It takes those three C's: cooperation--coordination--completion to have continuing education in context--at least continuing education in *my* context.

PLANNING MODELS

by *Brooke Sheldon, Ph.D.*
Acting Provost
Texas Woman's University

Material from Dr. Sheldon's Santa Fe workshop session on planning, including the evaluation component, follows. Dr. Sheldon discusses: the Public Library Association planning model prepared by the American Library Association's Public Library Association's Goals, Guidelines, and Standards Committee; the Program Evaluation and Analysis reports prepared by Public Technology, Inc. under contract to the U.S. Department of Housing and Urban Development; and the CIPP Evaluation Model developed by The Ohio State University Evaluation Center. Her conclusion is that any and all of these models have the components necessary for planning: problem identification, goals and objectives, strategies and resources, implementation and evaluation.

Dr. Sheldon began her discussion about continuing education planning models with comments about the nature of continuing education planning itself:

It seems to me that those of us who are very engrossed and zealous about continuing education ought not to succumb to the temptation of seeing continuing education as the solution for every problem. I think there's a tendency for that to happen. It's particularly important when we have the task of developing and, in fact, selling, a statewide plan that we look at the challenge of providing that plan in a context of the overall setting. A separate plan for continuing education probably won't work, unless continuing education is also a very large part of the long range plan for library development in the state. The worth of a statewide plan is directly in proportion to how closely it is integrated with the long range plan for library development in the state, assuming, of course, that the long range plan is to be implemented.

In talking about planning and evaluation, I would like to review with you two principles that may put this into perspective. First of all, there is no absolute certainty that any one training activity is the cure for any problem.

Second, when you do utilize training as a strategy to create change, you have to remember that if there is not a climate of change in the organization, it is not very likely that anything is going to happen. Therefore, you have to build into the training some strategies to deal with the inertia back home.

I am suggesting that you abandon the idea of complete certainty, and proceed with the practical test of evaluation which becomes one of seeking, with as little bias as possible, as much knowledge as we can about the results of continuing education--of training.

I think the basic question about continuing education planning ought to be "how do I include in a state plan for continuing education, a component that describes adequately and understandably, how continuing education will be updated, improved, and modified to meet the changing needs of the library and information community?" "What is an appropriate way to systematically approach the evaluation process?" The answer is: "There is no appropriate way, or rather, there is no *one* way."

If we are trying to sell continuing education for itself, I am convinced that we are on the wrong path. I think it's only saleable as one aspect of problem solving. There are problems that training may or may not answer. I'm convinced that when we try to convince people that something is good for its own sake, it's not going to work.

Integration of continuing education planning into the state long range plan is not just lip service. I think we fall into the trap of seeing continuing education planning as a separate kind of activity that goes on in a state. Note that those responsible for establishing a statewide plan have also a responsibility to suggest the kinds of continuing education activities that meet the overall goals of the state. We need to test our plan to see that it does relate to the services and needs of the state. We call this "criterion goal-relatedness."

From a number of planning models available, you can construct your own model or adapt one that works for you. There are a number of models that can be used and applied in each of the major stages of the planning cycle.

PLANNING AND EVALUATION

We, in continuing education, are defining evaluation as a process of gathering and analyzing information that will be used in making decisions. It is not necessarily judgmental, it says rather, that *under certain circumstances, one strategy may not have worked as well as another one.* Planning takes place at all phases of a training program, as in all phases of any major activity. If I were writing a state plan I would want to include the evaluation component of the planning process and I would spell it out. I noticed that there is a section in the Pennsylvania Plan which says exactly how they will evaluate. I suppose that the premise behind this is that if you don't write it down, it will not get done.

The first part of this planning is needs assessment--to discover "the problem." The second part is objective setting; the third is strategy selection and resource organization; the fourth is implementation; and the fifth is evaluation, or looking at what happens immediately after the session, as well as six months later, or a year later.

There are only three choices when you are looking at this process in terms of decision making: (1) *you continue doing what you did before;* (2) *you modify what you were doing and continue it;* or (3) *you discontinue it.* The fact is that we are still measuring training by the way participants *feel* about it. We are a long way from getting at client impact. That is not just true of the library profession, it's true of all professions. The mere fact that a person participates in a learning activity does not constitute adequate evidence of learning.

PUBLIC LIBRARY ASSOCIATION (PLA) MODEL

Let us look at the Public Library Association (PLA) plan to develop a new process of testing a planning model in public libraries. PLA calls step one "Determine Community Information Needs and Resources." In it, you describe the environment and the characteristics of the population; you survey the citizens; you survey the library users; you look at direct citizen participation. (This first step is essentially what Ruth Warnecke summed up many years ago.) There is nothing wrong with a basic community study, and nothing wrong with the approach step, but in my estimation, there is still too much emphasis on the analysis of the community, on the demographic approach, and on traditional approaches to looking at the community. There is not enough attention paid, at this stage, to problem definition. It is

somehow assumed that having gathered all this information, public libraries and their advisory committees will know how to translate this information into problem statements that live, breathe, and that induce people to form objectives that will correct these problems.

Step two of the Public Library Association plan is to evaluate the resources that the library has. The model says to determine base line performance measures, determine the impact of networks, and determine the role of the public library in the community. I like much better Doug Zwiezig's model for community studies. He put the client in the middle and the library "out here." I think that in a sense, the Warnecke and the current PLA models really analyze the community in direct correlation to what the public library is doing right now. It's kind of like business as usual. There is not enough focus on what may turn out to be urgent needs as viewed by the client, and as viewed by the library staff. Therefore, we are simply unable to set priorities, and again, as Drucker says when he tells us why we don't manage properly, we don't have any basis for giving anything up in order to do something *else* that's important. I think it's a basic flaw in the management practices of the public library in the country.

PUBLIC TECHNOLOGY INCORPORATED MODEL

The Public Technology Incorporated (PTI), also known as the Nelson Hoy model, called Program Evaluation and Analysis, was developed for use by local, and possibly state agencies to assess programs. It has a little different slant, and employs the same element of isolating the problem. What we tried to do in a previous Institute in Albany was adapt it and try to forget that they were, in a sense, picking up what was there, and on the one hand, evaluating it, and on the other hand, analyzing it. Hoy separated these two terms, which I always have some problem with. It is a complicated model, but there really aren't any new approaches in it.

If you are talking about problem identification, PLA essentially offers the community study. The Hoy program evaluation and analysis model defines problems. However, they concentrate on the problems in implementing programs that are already in place, not on community problems that a program might address.

CIPP MODEL

Then we have the CIPP model, which, in the first stage of the planning cycle, talks about this whole thing called "context." The model builds a kind of rationale for whatever decisions would be made about activities going on in a state, by looking at demographic characteristics. There is much more of an emphasis on client input in the CIPP model.

NEEDS ASSESSMENT

The most important part of the state plan for continuing education, I would think, would be the needs assessment. You could write down in your plan how you intend to go about doing needs assessment in your state. You could be very general about that, or you could be detailed. You could talk about using several different methods: interviews, group generation of competencies, survey questionnaires, the nominal group technique, group interviews, and, experimental designs.

Every single approach has limitations. I think what I'd like to see in these state plans is not just that needs assessments *will* be conducted, but also *how* they will be conducted, without stipulating needs that may be totally inappropriate within a year or two.

One thing to remember when you do use one technique in doing a needs assessment, is that it is very helpful to use the same technique as a source of data for the post-assessment. That sounds like common sense, but it doesn't always happen. We tend to post-look at some of the things we have done by talking to the people who participated. After the event, we go back to the bosses and ask them if they had noticed any changes. We really ought to be doing both. If you talk to the clients before they come, you ought to talk to them afterwards, also.

Doug Zwiezig points out that the cost effects of needs assessment may not seem very good. It can seem very high, particularly if you're starting out in an area where little systematic needs assessment has been done. However, later assessments can build on earlier ones, and they serve a lot of purposes. They motivate people; they generate interest. What he's saying is that the costs in this phase are worth it. We tend, as we do in all library programming, to leap ahead to the activities, without really spending the time in that first stage of the cycle.

There is another model called the Bradshaw model. The big advantage about this is that in using the needs assessment method, you are not just relying on the learners. He lists five needs: first, the *normative needs*. This is where you have a desirable standard laid down and compared with the standard that exists. There is the *felt need*. This is when people say that they want something such as how to manipulate the copyright laws so that we can function in our libraries. It becomes an *expressed need* when the library board decides that we ought to know all about the copyright laws. The *comparative need* is the result of comparing the skills of one group to those of another and deciding that one group must be brought up to the level of the other. Shannon added something called *client needs*, that is, what clients want from the professionals.

This model was used originally with the training of dentists. Apparently people who go to dentists have strong ideas about the kinds of behavior they would like dentists to exhibit!

This list of needs raises some very interesting questions. I think all of them are valid for we are all depending on a certifying agency, on clients, on what city hall thinks, etc. The question is, whose perceptions have the greatest weight? The tendency is to go with the expert and get good service. For example, if we have a concern that the whole process of networking isn't moving along as fast as we think it ought to, we tend to bring in experts in networking and rely very heavily on them.

Phase two of the planning, which I have characterized as *objective setting*, is the part where, if you have not identified the problems, you will have real trouble setting the objectives. We look at libraries pretty much in a status quo situation. I think that's the problem with objective setting in training--we tend to look at the status quo.

If, during the abstract process of problem identification, we turn that around and look at objectives for training, we might find that training will be an important part of the solution of a problem, but it will not be the entire solution. If we can do this, we will become extremely valuable in the overall planning for the state. Training should take its place as *a possible strategy* for problem solving. Only when we have it in that perspective are we really going to get support for training.

The Public Library Planning Process model says that step three is establishing a mission statement for the purpose of the library, and then setting goals and objectives, and priorities.

In the CIPP model we analyze one strategy over another. Is this strategy better than that one in solving the problem? In the CIPP model there are four principles to remember: 1) goal relatedness: if we do it this way is this more appropriately related to our goal? 2) efficiency: is this the best way to do it, at the least cost? 3) feasibility: is this the way that is most likely to succeed, or are we likely to be best able to accomplish our objective this way? 4) effectiveness: is this strategy the one likely to have the most impact? What strategy will create the most change?

Now, you can use these four criteria in looking at the problem, at the objectives, at the strategies, and you can use them for any part of the planning process.

The next part is implementation, and this is the part that most people really want to talk about. Librarians like to start with implementation in the planning process. Because we are program oriented, we like to talk about the continuing education experience itself. So when I give these talks, I like to stress the problems, since I think this is where we have the least interest in going through what we consider a long and tedious process.

SHELDON'S SUMMARY

There is really not that much difference in any of the planning models: Hoy's Program Evaluation and Analysis model, the CIPP model, and the Public Library Association model. In the implementation section we are talking about selecting strategy, training sessions, devising ways to look at what we are doing as we go along and modifying it if it isn't working. This is called *process evaluation*. In your overall state continuing education plan, in the evaluation part, you need to say that you will, in fact, carry out *process evaluation* while the training is going on.

Thus, the format for planning is:

Planning Format

Identify problems

Set goals and objectives

Determine strategies and resources

Implement the plan

Evaluate the process or program

Any and all of these models have all of these components although sometimes different terminology is used. Any model, or your adaption of it, will get you there!

Dr. Sheldon recommended Evaluation of Continuing Education for Professionals: A System View, University of Washington Press, 1979, edited by Preston LeBreton and others for further reading.

MANAGING THE STATEWIDE CONTINUING EDUCATION PROCESS--PART I

by *John A. Bachmann, Ph.D.*
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The material which follows is taken from two seminars conducted by Dr. Bachmann during the Santa Fe workshop.

Objectives

To assist you in developing action plans for effectively managing an on-going, statewide program of continuing education through your learning:

1. *A management process for a statewide continuing education program*
2. *Organizational guidelines for a statewide continuing education committee*
3. *Common inhibitors of effectiveness*
4. *Techniques of needs assessment*
5. *Training problem-solving skills*
6. *Pitfalls in gaining agreement and commitment*
7. *Problems concerning resource identification and program implementation and control*

My understanding is that you're here to develop an *action plan* for statewide continuing education coordination and planning. In these sessions we'll focus on effective management of the statewide process. The above are many of my goals. I'm not sure that we will get all of them done, but hopefully, we can get most of them accomplished.

First of all we should talk about the management process for a statewide continuing education program. We'll talk about how to form a committee; how the committee should process information; how it should go about doing projects.

Second, we will talk about guidelines for organizing a statewide committee and how to manage it. We'll discuss the inhibitors of program effectiveness, i.e., the things that tend to limit groups in their ability to provide effective statewide continuing education. We'll also discuss techniques of needs assessment. We'll discuss how and when to use them. You will find that there are some things that you do initially to get started, and then some other things you do later on, once you're established.

Third, we will talk about creating problem solving skills. Since needs assessment is one of the problems which needs to be attacked, then we must talk some about how one goes about solving problems. In addition, we'll talk about pitfalls in gaining agreement and commitment, and the implementing, and controlling of programs.

Dr. Bachmann had the participants break into small groups to discuss two questions:

1) In your state, what inhibiting factors have been making it difficult for you to develop an effective program of statewide continuing education? In essence, what have you found to have been the barriers you have had to overcome, the challenges, anything that has been inhibiting you?
2) What factors do you think will have to be avoided or overcome in the future?

Following is Dr. Bachmann's list of typical program inhibitors, followed by the list of inhibitors identified by the small groups.

BACHMANN'S LIST OF TYPICAL INHIBITORS OF PROGRAM EFFECTIVENESS

1. Lack of leadership. When nothing gets done, usually it's because the state doesn't have a person or an organization who will take it upon themselves to get started. You may not have put that on your list because it's hard to blame oneself for lack of leadership. It is very easy to point a finger at everyone else for not providing the proper leadership. If there is a leadership void and you think something needs to be done, then you need to take the ball and go with it. If there is nothing being done, then look at yourself.

2. Lack of clearly defined management process. When there is no defined process for implementing and administering programs, there are a lot of committees formed and everything is done on an ad hoc basis. Every program is a "one of a kind" thing, and we have to re-invent the wheel every time we go through a program. I think that it is very important that a group sit down before beginning to do programs and address how they will administer the whole thing.

3. Conflict among committee members, or conflicts within the state. Too much regionalism in a group is typically a problem, or there are problems between agencies, universities, and the various groups being served. These conflict problems are very prevalent. Most groups have to go through this, and it is frustrating. As you try to come up with an action plan, the conflict becomes obvious because there are differences; value differences, perceptual differences, role differences. You'll just have to work through that--you've got to evolve through that stage, and the staff and I are here to help you if you're having problems.

4. Inability of the committee to make effective decisions. Usually the cause of this tends to be difficulty in actually making decisions. Committees meet and meet and meet, and nothing ever gets done. People talk a lot about decisions, but never make them. Committees need leaders who understand the dynamics of group decision making.

5. Insufficient funding. You may rank this a bit higher than most other groups. I am usually dealing with groups who have enough money. I gather that your sources of funding are very limited, more limited than the typical groups I have dealt with.

6. Insufficient understanding of the continuing education process. I think a lot of people do not understand the difference between training programs and educational programs. Many people don't know how to write good objectives. Any group providing continuing education services today should be professional.

7. Lack of goals and objectives. Many groups do not take time at the beginning to set clear goals and objectives for their activities. This can lead to inefficiency and ineffectiveness. It is also difficult to evaluate program effectiveness unless there are goals against which to measure results.

8. Committee operates in a reactive mode. Typically a lot of groups just respond to needs surveys. "Proactive" has gotten to be a trite phrase, but it's still a good word. We'll be looking more at this. I'm not saying you can't act in a reactive mode--I think politically it's important to do so. Initially, you have to act somewhat in a reactive mode. However, over a period of time, a group must become more proactive to be effective. There has to be a transition from reactive to proactive behavior.

9. Cost minimization approach for the delivery of services. When funds are limited, I find lots of groups try to spread their funds too far. They take a cost minimization, or a quantity versus quality approach. They get tied up in the numbers game: How many people have we trained this year? How many programs have we done? Particularly when dealing with federal and state funding, we get hung up in numbers to justify what we are doing. What tends to happen is that you do many programs, but they have very little impact. *Results* are the key thing that you are going to have to deal with. You're going to have to look at how to spread the resources. Is it better to do a few programs with high impact than a lot of programs with no impact? I tend to lean to the former. If I have limited funds, what I'm going to look at first is quality and impact. I will do as much as I can, but I'm not going to sacrifice quality. If I train only 10 people, then that's all I'm going to do in one year. But those ten people will get an excellent training program!

10. Insufficient utilization of experts. Again, committees frequently tend to re-invent the wheel. They do not seek experts often enough that could help them.

11. Emphasis on rules and procedure versus policies. Groups tend to get very rule-and-procedure oriented versus policy oriented, particularly when instructional fees must be determined.

    When you do a program, what are you going to pay instructors? Are there going to be absolute or flexible limits on fees? I think you will find that when you get into running programs, you don't set any definite limits on what you're going to pay people to do programs because they vary by profession.

12. Needs assessment paralysis. I think a lot of people here are going through that. I tend to find that people get hung up on needs assessment. Two things happen: either they're always doing needs assessment, and therefore they never seem to do programs, or, they do a big needs assessment and that becomes the gospel for ten years. Somewhere in between is where you have to be.

13. Ineffective program evaluation. *Dr. Howick's material on evaluation problems and processes begins on page 49.*

14. Lack of program follow-up. This is very different from program evaluation and is covered on page 42.

15. Lack of client commitment. You can't force training down people's throats. If you don't have commitment, then it's hopeless. Individuals have to be in control of learning processes. I can't train you, I can't educate you in anything. As an educator, all I can do is create an environment in which you can teach yourself something. I can present materials and concepts, but you are in control of the learning process. I think we have to realize that. If we don't get commitment on the front end, all we do get is a lot of talking about things, but no learning actually takes place.

SMALL GROUPS' LIST OF INHIBITORS

1. Uncertainty at the administrative level. Priorities are unknown. You don't know what you need to be doing.

2. Geographic isolation. In some states, the size of the state makes it difficult to get people together.

3. Small number of professionals. The library community is so small that we are constantly seeing the same people over and over again.

4. Delivery of service. It's hard to deliver service when you have a wide geographical separation, and there may not be enough people wanting a particular thing to be able to provide it.

   (BACHMANN) *In that case, it sounds like you may have to have regional cooperation. Having a regional structure may overcome that by creating structural delivery systems. You may have to be thinking about a regional clearinghouse or a regional committee.*

5. Lack of coordination. Often no one is taking the responsibility of the coordinator role.

6. Lack of a library school within the state. This is seen as a lack of a particular type of expertise which a university could provide.

7. Lack of definition of what continuing education is. Continuing education means a lot of things to a lot of people. Consensus is lacking about scope.

   (BACHMANN) *I think you have to define, in your own state, what continuing education means to you. I think that you've got to respond to your unique needs in your state.*

8. Disagreement of what the training needs are.

9. Controversy over mandatory-versus-voluntary training.

10. Budget limitations.

11. Diverse types of training needed for professionals; for technical people; for clerical people.

12. Lack of incentive, motivation for continuing one's education.

    (BACHMANN) *What you are saying is that people don't perceive there is real benefit from continuing education. Maybe they do not feel they will get to use the things*

they would learn. Maybe it is a value system problem. Maybe you need to look at how jobs are structured. I've been in some organizations where we had to find time so people could reflect on their jobs. They were so busy doing their jobs, ten hours to twelve hours a day, six days a week, that they really did not have any time to reflect on what they were doing. If people don't have time to learn, experiment, and reflect, then you may need to deal with the organization climate before dealing with training.

We could be poor time managers, too. In fact, one of the things that I like to do in most groups is provide a time management course. It's a good way to start, because unless one is effectively using one's time, you can't do too much with other problems.

13. Assessing programs and how to put one together.

(BACHMANN) *If you have not put programs together before, it's difficult. It may seem easy to do, but it is not. This is one area where you might want to use experienced professionals.*

ISSUES IDENTIFIED BY INDIVIDUALS

1. Proposition 13 syndrome.

(BACHMANN) *If funding is going to get tighter and tighter, which I think is going to happen, then does the committee look at an alternate source of funding and ways of generating funds? Does that become part of the statewide committee's role, to assist in the whole funding process?*

2. Resistance to mandatory certification. There is resistance to both mandatory continuing education and certification.

3. Administrative acceptance and follow-through.

(BACHMANN) *This involves dealing with the administration in such a way that they will accept and follow-through with your plans. What is acceptance a function of? If we're talking about commitment and acceptance, you must acknowledge that this comes when the administration sees the value of what you are proposing.*

Often when we set up programs we focus on what it is that we are doing--the number of courses, the number of programs--and we don't ever stress the end result. What is the result, what is going to be the value received if one attends the course? When you are sending out information on a program, what you should be doing rather than describing the course, is defining the objectives in terms of what it will do for the participants; what the participants will be taking away from the program, the value that will be received. Then outline the topic.

4. State library association acceptance.

5. Creating a delivery system structure.

6. Role identification.

(COLORADO TEAM) In Colorado there are two dozen agencies that have direct connection with library continuing education. A communication problem exists. There are too many providers of service and not enough coordination.

(BACHMANN) *There has to be a dominant group or organization if there is going to be any effective programming. There has to be somebody who leads and becomes the main provider, the main coordinating source. Where there are a lot of groups involved, frequently the efforts are too spread out with no one person really doing a good job. It would be nice to try to coordinate with everyone, but if you find you can't, then you have to go along and do the best you can. And if you are providing the results--better results than anyone else over time, in a very cost effective way--then over time, you will be regarded as the main provider or resource, if that is the role you want to play in the state.*

Now some of you may decide that you don't want to become the main provider. You may want to be just the coordinator. You can be a clearinghouse or reference source for programs. You may also provide scholarships for people. That is a feasible strategy, if you want to adopt that model. (We'll be talking about different modes one can use, and that can be one. This will be something you will have to decide very quickly in terms of the role and scope of your operation. This is one of the things that I think you should start addressing at this meeting--are you going to be in a reacting, coordinating mode, or in a providing mode.)

(JIM NELSON) Wisconsin has identified 115 such groups. I think it is kind of overwhelming. I think that the attempt to have a state program without a federation approach sometimes can freeze us into needs assessment paralysis. It can also freeze us into program development paralysis, because there's so much to do.

I brought along a directory which lists the 115 providers and what they do. We still haven't done a content analysis of what they perceive as their role in continuing education. I think what we need to do is see how that relates to funding for state, regional or local programs.

(BACHMANN) *Here is where the state legislature plays a role. You will have to make a decision about your dealings with the legislature. In defining your role and scope, do you react to legislative requests, or do you lobby actively with the legislature, suggesting there should be laws, suggesting kinds of funding situations? That's going to be a fundamental decision you'll have to make, i.e., the extent to which you are going to have to lobby.*

(PARTICIPANT) There is also the fact that many crucial decisions are made by individuals in the legislature who are influenced if someone from some small area calls up. It has happened that the intended program funds go some place else, just because of one person's phone call.

(BACHMANN) *Therefore, the issue is communication with the legislature. Once you start doing programs, to what extent should you communicate to the legislature about what you are doing? Do you send newsletters keeping them informed so when they get these kinds of phone calls, they won't pressure you too much? Keeping them aware is helpful in getting additional sources of funding.*

(PARTICIPANT) Another issue that needs to be addressed is the fact that there has got to be something built into this plan to ensure quality control of the continuing education programs at all levels. In other words, will there be a few good programs versus a lot of poorly put together ones?

(BACHMANN) *If you decide that your purpose is to be a clearinghouse for programs, then you will have to make a decision about what standards you are going to use to recommend programs; about which programs you will help*

subsidize. That gets politically very touchy. I wish I had an easy answer to that one for you. A lot is going to depend upon your credibility to make decisions about quality. Therefore, I think your committee has to have people who have personal credibility in the profession. There are also ways of gathering data as we evaluate. This, hopefully, will be addressed later this week.

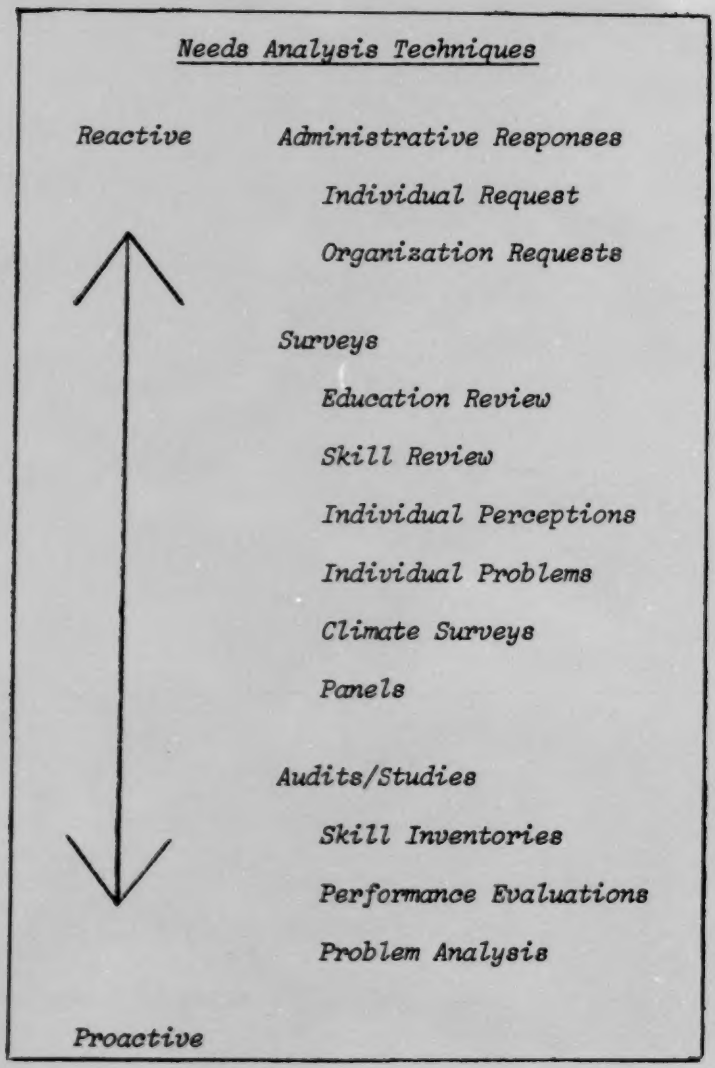
(DR. STONE) In a survey of the library profession, we found that this issue of quality was an important one, and this will be addressed later. There is a national council working on criteria and guidelines for quality in continuing education which are voluntary in their acceptance.

BACHMANN'S SUMMARY OF ISSUES AND PROBLEMS

I guess that you saw a lot of the same problems that I saw. Some of them you haven't faced yet because you are not far enough along, but you will probably have to face them pretty soon. Don't let that scare you. One of the groups I was listening to decided after they had come up with their list it almost made them want to go home! I think you will find as you go through the list that you need to tackle your problems one at a time. And you will find that as you are dealing with one, the others get easier to solve. Don't try to tackle them all at once. Decide what your problems are, put them in priority order, decide which problems to deal with then decide what you are going to do to solve them.

NEEDS ANALYSIS

There are three basic ways programs are initiated: (1) request from client groups. These can be from individuals or from specific organizations; (2) surveys of client groups; and (3) commissioned studies. Here we are talking about needs analysis. Let me point out how these three fit together.



In terms of needs analysis technique, you can be in a very reactive mode where you can decide that, at least in your present stage in the situation, it is appropriate for you to react, rather than do anything proactive. Then you do respond to specific requests. That's one way to define needs. You respond to requests over time, and in so doing, try to allocate your money as effectively as possible. The problem you have with responding to requests is you don't know very well ahead of time if the program will be useful, or if you are spending your money effectively. Often when organizations make a request, they don't really know what their problems are. I'll give you an example: a couple of years ago a man from a state agency called me. He wanted a seminar on motivation for his department managers because they allegedly were not motivated. When I asked for an example, he said that they never did anything he told them to, that they were resisting him! That person did not need a seminar in motivation. It would have made his problem worse.

I think you will have to assume that the vast number of clients don't know what it is they need. Another example--as we were designing this program Eleanor asked me, among other things, to discuss techniques of needs assessment and how to implement statewide programs. I told her to write a problem statement so that I would have something specific to address, so that at the end of the program I would know if I had solved the problem. Eleanor wrote an interesting problem statement that said:

> "In my state there are a host of committees, task forces, and other groups concerned with some aspect of continuing education for librarians and library-related personnel. Sometimes it seems as though everyone is talking about the need for cooperation and for coordinating provision of continuing education programs and activities, but little actual coordination of efforts occurs..and as for maximizing resources and minimizing duplication of effort--why, no one really has a grasp on who should do what. I wonder if all this coordination business will ever get off the ground..."

It seemed to me then, that the problem was one of *managing* a statewide organization, a statewide continuing education function. Then we started to shift my topic around, to what it is now. When I came here yesterday, we shifted it a little bit more, depending on what I was hearing the groups' needs were.

People not knowing what they need is also the problem with survey techniques. Surveys are sort of in the middle of the reactive-proactive continuum. You ask people what it is that they need, but you do it in some sort of guided way. It's a little better than simply responding to requests. You can structure an educational review questionnaire which gives you feedback about such things as educational background, number of programs attended, kinds of programs attended, kinds of magazines subscribed to, etc. Another thing you can ask is the kinds of skills people have. You can come up with a list of skills that are required in the profession and have them check off to what degree they have them, and to what degree they aspire to have them. You can get a gap on a scale of one to seven of where they are and where they would like to be. I find it very useful to get people's perceptions on how much of a certain skill they think they need. *Self-assessment and competency gaps are covered in the postworkshop session #1.*

Another thing you can do is find out what people's perceptions are about what they need. You can do this with a list of possible seminar topics and ask how badly they think they need each one. The problem you get into here is usually that the data is of very limited usefulness because if someone doesn't know that they need something, then you get poor data. There's an education gap. Until we go to a program and hear what other people are doing, we don't know what we need to learn. Politically, however, these surveys are very wise strategies. I think when you get started in the state you should be doing surveys of this type because that's how you get commitment from individuals. You have to ask them what *they* want--then they have some ownership in the plan. While I critize this approach from the value of the information that you'll receive, politically it will be a good strategy to do some survey work.

You also can ask them for problem statements. If you get problem statements, then hopefully, experts can look at them and decide how education can address the problems.

Another needs assessment technique is to do climate surveys in which people are asked to evaluate their organizations. You can assess how well a library is operating.

Another kind of survey one can use is called "panels". This is a good technique in which you use a group of people such as potential participants, experts, and resource people, to determine educational needs. The Delphi and Nominal Group techniques are popular panel survey methods.

People generally don't like to tell other people what their problems are, particularly if these people asking questions are heads of the state library associations, or persons at that level. So the problem comes down to finding the right person(s) to do the survey. The more you can get an independent third party--someone who is non-biased--who does not have a vested interest in this survey--the better the results.

Another problem with surveys is that the people who want education the most are the ones who need it the least; and the ones who need it the most won't come. You get sort of frustrated when you're in this business. How do you reach the people who truly need it? Ultimately, one has to get to their supervisors to really get at the problem. You also need to show people the real benefit of education. There are some people who just don't want it. They don't want to grow, they don't want to learn, they don't want to do anything different. There isn't much you can do for those people. You can identify them, and then forget them. They'll complain a lot, by the way, of the things that you're not doing, even of the things that you are doing, but they'll never come to your programs.

The third way of needs assessment is the proactive way, doing audits and studies. Skill inventories are a little bit different than asking people's perceptions of their needs. You send out people with some expertise in the profession, and they look at the organization and ask what the required skills really are.

Performance evaluations are useful if the organization is doing it at all well (the problem with most organizations is that they don't evaluate performance well). If there is good performance evaluation data in an organization that a study group can look at, they can easily get to the training needs. Most organizations are evolving to a format where, as you evaluate performance, you also ask what management can do to

support the individual in the accomplishment of the goals and objectives. This information can be analyzed to obtain training needs. This is very valid information because you are responding to what the true performance problems are, where a supervisor and subordinate have said that certain education and training is needed in order to accomplish goals and objectives for the next year or two.

GUIDELINES FOR COMMITTEES

I am assuming that you are going to form some kind of statewide committee. So let's discuss some guidelines for this committee.

1. Size. The first item is the size. An ideal size for a statewide group would be seven to nine people. If the size goes much above nine, effective decision making doesn't take place. When you have a group that is too small, such as three people, you may not have enough resources within the committee. I think that the teams here would want to serve as a *catalyst* for their state committee. In the first part of your action plan, you should discuss how to recruit additional people for such a committee.

2. Composition. Whoever has the main control of funds should generally serve in the committee leadership position. If not, then it should be someone with a very dynamic personality or someone with a great deal of expertise or recognition in the field as a continuing education professional.

   In a committee it also is good to have one or two providers of services, someone in library staff development, and someone with a continuing education background outside of the library world itself--such as from a college of education, business, or continuing education. It's essential to have one really good continuing education professional on the committee. Most of you have been having a problem in defining what continuing education is, but if you have a person on the committee who understands that, he or she can be a tremendous resource to you.

Usually there are some additional political decisions about regional representation, etc., that have to be handled. Here it is difficult to select appropriate people. You want individuals who can strongly represent the concerns of the various regions or types of libraries. But you do not want people who will create excessive conflict. However, you need broad representation in order to gain acceptance and commitment throughout the state from state and regional organizations. You don't want to get a narrow clique--that's the one thing you want to avoid.

Now, if you already have a group that is too large, I would suggest that you gradually try to evolve toward a sub-committee and task force structure. The other thing you can do is just work everybody very hard, so some of them will drop off. The most committed people will usually remain and the less committed members will drop out. So you have two approaches: you can work people hard and get some of them to self-select themselves out; or, you can divide them into sub-groups and end up with an executive committee with sub-committees.

3. Scheduling of Meetings. I think committees have to meet on a routine basis. When someone signs up to serve on the committee, they have to make a commitment. Therefore, they have to know how often the committee meets, how long the meetings are going to last, etc. You need to know at the beginning how much time you are committing yourself to. I like the approach that when you ask someone to commit time to committee work, you also get commitment and endorsement from the person's administrator.

It takes a lot of time to get a committee functioning. In order to get things going, you need to meet on an intensive basis for about three to six months. By meeting frequently in the early stages, you can work through organizational problems easier. So, for at least three months you may be meeting every other week, or at least once a month. Then after you get going you can meet on some other basis of every other month, or third month.

4. Membership Rotation. Have a membership rotation policy so you can get people off the committee who are not working. Any time you set up a committee, don't ever make it

difficult to get people off it. People tend to think their appointments are indefinite unless you make it clear at the start that they are limited. You can set up a two-to-three year rotational membership, with the possibility of two or three consecutive terms. This allows you to rotate people off if you want to, but not rotate those good people off that you don't want to lose.

5. Evaluation of Committee Effectiveness. Whatever you do, provide some means of evaluating committee effectiveness. Set up an auditing group for the statewide continuing education committee. While the committee will be evaluating programs, you also need someone to evaluate the evaluators. I would suggest forming a group using people in the business community, library administrators, or library patrons to oversee the overall committee.

6. Education for the Committee. One of the first things that you want to do is establish a continuing education program for the committee itself. Nothing is worse than giving the perception that everyone else needs education but you don't need it yourselves. Therefore, I think one of the first things that you should do is use some consultants to evaluate the committee and help you work out your own continuing education program.

7. Funding. If you have a little money, you are not going to achieve much of anything, unless your strategy is to do something, make it good, and use it to obtain more funding. Do a program with high perceived value, and use that as a way to get increased funding. The quality of what you do with your limited funding is critically important. If you try to spread that widely, it's not going to have much impact. You've got to do something very good, with high visibility, and a lot of perceived results. For example, if you have limited funding, I would suggest that you consider a pilot program approach.

   You take a library, a library group or organization, and focus all of your resources in it to see what you can do to achieve change. Concentrate your limited resources on that one very narrow group, and then publicize that as a pilot program, with demonstrated results.

   If you've tried this approach and found that, although the program seems to have value, after the funding had dried up, no one else picks up the program, you might ask yourself if the value was real. Often we can

convince ourselves that something is of value, but remember, it has to be *perceived* as valuable to the receiver. If the receiver really feels that he is receiving something of value, he'll hopefully help you get the funding you need.

It's surprising how many organizations, foundations, etc., will fund continuing education kinds of things. If you see your funding sources as mostly state and federal related, you are missing a lot of major sources of funds, such as private foundations and business which may be very receptive to this kind of thing.

8. Program Fees. Most groups start off by saying, we'll never be able to collect enough revenues from people to make it go. But, if programs are any good they can cover costs. One thing about programs that I've learned in my business is that they can be under-priced. If the fees are too low, people think that they can't be good.

(PARTICIPANT) I have found that the ratio of people wishing to get into programs is in proportion to the fee I charge. The more I charge, the more people want to get in.

(BACHMANN) *Let's be careful. You can charge more than what the programs are really worth. Ethically, we're going to have to hold our cost down as low as possible, but at the same time, we shouldn't give our services away.*

I would think that most of you would have to gradually escalate your fees. You can't suddenly raise them. In my state the library association, as they have gone into more sophisticated types of programs, have had to raise their fees gradually as people could tolerate them. Another thing you could do is use organizational membership fees. Sometimes it is easier for people to get a large chunk of money in their budget for memberships than to get individual approval for a specific course. If possible, use membership fees to subsidize course fees.

9. Coordination of Programs. I think that when you do a program, there's a tendency toward committees to run the program. Anytime you come up with a course or program or seminar, there has to be an *individual* who has a designated responsibility for program coordination--one person who gets yelled at if something is not going right. Don't try to run programs by committee. However, you could use your committee members occasionally so they will understand

the problems of running courses. You should also use professionals--people who know how to run programs.

10. Utilization of Experts. Use consultants for specific projects to meet varying demand levels and reduce staff overhead costs. You may want to use them on task forces for such things as studying the needs, preparing innovative kinds of programs, looking at issues in management, marketing, fund raising, finances, etc. You might set up different task forces with narrowly defined functions to concentrate on that one specific area. They then make reports to the whole committee. This is particularly helpful with a large committee structure.

MANAGING THE STATEWIDE CONTINUING EDUCATION PROCESS--PART II

by *John A. Bachmann, Ph.D.*
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Dr. Bachmann reviewed some concepts from the first seminar as an introduction to a discussion on the administrative process of managinging continuing education statewide.

PROGRAM IDEAS

Ideas for programs come from: 1) client requests 2) client surveys and 3) studies. Clients can be individuals, groups, or libraries.

For political reasons, I think you'll be doing client surveys initially. Since you need to market the benefit of continuing education, the more you can relate directly to what individuals *think* they need, the better.

You need to define the basis on which you will be deciding who gets money and who doesn't. Don't imply that you have an unlimited source of funds. I like to make the level of commitment toward continuing education the main basis of "who gets money and who doesn't." If someone just asks for a specific program, i.e., they want money for just a particular course, I don't give them as much priority as I do to someone who can present an educational plan for the next two or three years. I think the same goes for organizations or associations, or libraries. The more you can get people thinking of a long range *continuing education plan*, the better.

I think you'll be functioning more and more in the study mode. After about the first year, you will be setting up task forces--sub-committees--that are looking at problem areas and ways of addressing them. You'll be operating more and more in this mode.

PROGRAM COORDINATION

Once you have information coming into the committee, the committee decides whether or not the request is a priority one. For example, a library or a group of libraries, requests a program and the committee fits the request against a priority table: does this request fit our priorities? Is there any money left in this category? If the committee decides "yes," the request is of priority, it should then pick a program coordinator.

Usually, I would suggest that committee members function as program coordinators as much as possible. But whomever you pick as program coordinator should be someone with continuing education *administrative* skills in coordinating programs --in the design, implementation, evaluation, follow-up, etc. of programs. While it's good to get committee members involved, the committee will probably end up with additional people to function as kind of a staff of program coordinators.

Program coordinators don't have to be experts in the subject areas. For example, if a request comes in for a management seminar, the program coordinator doesn't have to be a management expert. The key is whether or not a person knows how to administer a program. For the subject area expertise, you usually involve a consultant or instructor who is knowledgeable in the field.

PROGRAM COORDINATOR

There has to be one person, however, who is ultimately responsible for any particular program or project. You cannot split responsibilities in ways that might allow some details to fall through some cracks. There has to be *one* person who is in control and who is responsible if something goes wrong.

CONSULTANTS

Often a lot of organizations underutilize consultants and don't really know all the ways of using them. There are three purposes for bringing in other resources. One is to expand capability on a short term basis. You don't want or need to create a large staff of full time paid people. You want to avoid that as much as possible. When you get specific program requests it's really cheaper in the long run to pay the experts, even though the consultant's fee may seem high. It's really better than having a lot of expensive staff and a lot of overhead. It is easy to shift from one program area to another by using consultants.

Another reason to use consultants is to gain objectivity or leverage. The advantage of gaining an unbiased view of a situation is obvious; however, the advantage of leverage gained sometimes is not. Frequently, the use of consultants can help the credibility and prestige of a study or program. They also can sometimes say or do things that the committee would rather not do itself.

(PARTICIPANT) In terms of training, are you usually referring to a consultant as a trainer, too, or would it be wiser to use a consultant in the development of a training program, or hire a trainer to do it, or would that be a disaster in any situation? I'm trying to distinguish between consultation and training situations. In consultation, in setting up a training program, would it be difficult to have a consultant design the program and then hire a trainer to come in and do the training?

(BACHMANN) *It usually does not work to separate the program design and instruction functions. Generally, it is very difficult to design a program without considering who the instructors will be and how they present their material. You can use someone to sketch out a program, but you should not constrain instructors by having them teach material they may not be totally comfortable with.*

GOALS

Programs should be based on the achievement of behavioral and cognitive goals. In this way you can assess the effectiveness of programs. We would like to have behavioral change for most programs, but sometimes this is not possible. Often the purpose of the program is just to provide information. You might hope that there will be behavioral change, but if you are not sure that you can measure it you should not specify the behavioral change as a goal.

AUTHORIZATION AND DELIVERY

The next step is authorization of the program. The program coordinator takes the proposal back to the committee, and the committee gives it a "go, no go" decision. You have a budget, you have the goals and objectives, and the decision is either to do it or not do it. Once the committee approves the program you are into a *delivery* mode of operation.

(When I talk about continuing education, I'm not necessarily talking about seminars or conferences. I think the committee will be dealing with the fact that there may be individuals who need assistance, or an organization which needs assistance, and a seminar is not necessarily the best way to satisfy these needs. Direct one-on-one consultation can be a form of continuing education for a client.)

EVALUATION

There needs to be an evaluation phase in all of your program activities. One source of information is participant evaluation. I prefer for the program coordinator to summarize the information and give the data back to the participants. If people go to the trouble of evaluating a course, they ought to get back some of the data. Also, I have found it can be a tremendous part of the learning experience to get evaluation data to see how one's perceptions of the course relate to the perceptions of the other participants.

Usually, whoever is sending the participants to a program or paying for a program, should be involved in evaluation too. There should be a process whereby they provide feedback to the program coordinator, particularly if you want information about any potential behavioral change of the participants. Instructors or consultants should also evaluate program effectiveness based on their feedback from participants. I like to have instructors evaluate a course before they see the data from the participants.

You should have participant evaluation, instructor evaluation, and client evaluation of the program. This data is summarized by the program coordinator, and the participants usually get back the summary of their evaluations as participants. The consultants or instructors and clients get back a *total* summary of the evaluation data from all sources.

The reason that I don't like clients to get the participants' evaluations in advance of doing their own evaluation is that I like to force them to go and talk to the people who were sent to the programs. It is a way of reinforcing what was done during the course. I like to make them search that out--make them have to come up with some statements--make them have to talk to their people.

(PARTICIPANT) Why are you just giving back partial evaluation information to the participants, and total information to the instructor or consultant and the client?

(BACHMANN) *I think all that is valuable to participants is how they view the course versus how other participants view it. The consultant's evaluation of the group would not be that much help to them. A lot of times a consultant's evaluations should also be indicating follow-up kinds of programs for future use. In addition, the instructor indicates whether or not the group was a good one, how well the program was administered, notes the quality of the facilities, etc. These are the sorts of things that participants don't really need to have feedback on. I don't see what value that information would be to them.*

(PARTICIPANT) As a participant, I can see that I would be quite interested to know what my boss thought about what I had done.

(BACHMANN) *But that's not the program coordinator's function. If you're interested in what your boss thinks, you and your boss need to deal with that. The more the committee serves as an intermediary between people and their bosses, the more trouble it's going to get into. The reason I'm feeding some of this in different ways is because I like to force some exchange of information and there's a fine line here. There is no way you can mandate this, of course, but you can set it up so that it has to occur. The client really needs total information. They are the persons who are paying for programs. If they want to feed any of the data they receive back to participants, that is up to them. I think that it is their decision to make.*

(PARTICIPANT) I'm particularly interested in the client evaluation for those of us who are supervisors, or managers of libraries, who signed up someone to go to the course or workshop. I like the idea of the appropriate dialogue between the client and the participant.

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At the end of the course the program coordinator sends an immediate program evaluation from the participants, the instructor(s), and the clients, along with a certain cost accounting, to the committee. This is another source of input for determining the needs. The committee can see how well programs go over, and that gives them some input into future programming.

Some people like a carbon copy of the client's evaluation to go directly to the committee, rather than just go through the program coordinator. You can also send the committee a carbon copy of the instructor or consultant's evaluation. One advantage of doing this would be to find out how well the program coordinator did his or her job. The program coordinator is a key link.

The question of who is evaluating the evaluator comes in here. I can see some desirability for also having these people (clients, instructors) not only evaluate the course, but do a checklist to see if the program coordinator did a good job in helping to meet and find the needs, run the course, select good instructors, etc. The committee has to also be deciding who are good program coordinators, so you need data for that. I prefer not to have this checklist be mandatory. I like a system where the clients and the instructors are sending things to the program coordinator, with the option of sending a copy to the chairman of the committee. You may want to make that mandatory. This is all the immediate data.

Let me just say one more thing about evaluations. High participant evaluations don't necessarily tell you that your program was good. Low evaluations tell you that you have a problem, but high evaluations don't tell you everything is fine. Some instructors can entertain a group and get high ratings, but they don't teach anything. I like to use professional program evaluators. This can be someone with a good knowledge of the subject matter. They sit through the seminar to do a content evaluation of the subject. So, I not only have the participants' ratings, I also have someone who is knowledgeable in the field observing the course.

PROGRAM FOLLOW-UP

While immediate program evaluation is very useful, I think you should be more concerned with program *follow-up*. All you can generally measure at the end of the course is how happy people were with it, and whether the instructors communicated what they said they were going to communicate. You can't really measure whether anything's happened or not. The real purpose of the course is for something to happen. For example, you really don't know if this course is successful for about six to nine months. You can't evaluate the effectiveness of it here today.

You should decide, at the beginning of a course, at what time it would be appropriate to follow-up on the course. At what time we would really know whether or not the objectives were reached. For some courses it will take only a week, others may take four weeks, others longer--you never know. But at the front end, you need to determine what time schedule is needed for the follow-up. This is when you go back and find out whether or not you did all the things you said you were going to do. That usually means dealing with the client again, or using a survey, or commissioning a study. You ask if the program had any impact--did it do anything? And this information gets sent back to the committee.

PROBLEM SOLVING

Everything we have talked about so far is predicated on the assumption that you are good problem solvers. If the continuing education process is one of defining and addressing problems, you need to be very good at problem solving.

PROBLEM SOLVING SKILLS

Therefore, we are going to have a brief session on problem solving skills.

We want to look at how you think through problems. First, I want to start you off with an abstract problem to measure your level of creativity--your creativity quotient. If you would get out a sheet of paper and a pencil, I will give you this assignment to do individually: Draw nine dots on your paper so that they are equidistant both horizontally and vertically. Your *task* is to try to find a way to solve a problem. The *solution* is to connect all nine dots with four straight lines without removing your pencil from the paper. I'll give you five minutes to work on it.

Not many participants were able to solve the creativity problem. Dr. Bachmann then began discussing the things that inhibit creativity--the things that tend to inhibit an individual or a group's ability to come up with creative ideas in problem solving.

CREATIVITY PROBLEMS

Now you see the reason why the continuing education management model, covered in the first session, stressed the *proactive approach*. The more a person operates in a responding fashion, or a *reactive* mode, the less likely it is that he or she will come up with ideas, (The model is illustrated on page

We take a trial and error process because there is a pressure to come up with a solution quickly. This can lead to two problems: 1) *fixation* and 2) *satisficing*. You probably noticed this happened to you. Look at the ideas you came up with. I suspect your first idea is repeated several times. Over and over again, you kept coming up with only variations of the same idea. Well, this is the "fixation" problem caused by the trial and error process. If you have a problem, and you come up with a way to solve this problem quickly, then analyzing or evaluating that idea causes your mind to focus on it and not look at other ideas. Evaluating alternatives as one goes along inhibits one's ability to come up with many alternatives.

One of the first things you should do is look at alternative ways of solving the problem, without evaluating any of them. For example, when I was preparing for this workshop, I came up with four different approaches that I could use. I first thought about all the ways I might do the sessions; then, I tried to evaluate which one would be best. It's a very different process than coming up with an idea and then evaluating it.

Task urgency is another potential problem. The more important it is for us to come up with a *quick* solution--and the more important it is for us to come up with a *creative* solution--the less likely we are to do so. One thing you need to learn in problem solving is not to get into too much of a timetable trap. Give yourself time to deal with problems. The problem with task urgency is *stress*. The more stress we are under, the less effectively our minds work.

Another creativity problem is being *overly systematic* in your method. I think this happens particularly when you are using decision models. Even with the continuing education model, modify what I've given you to suit your needs--don't ever follow anything absolutely. Don't ever get hooked into just a single rigid method. Methods should be used flexibly.

Another of the big inhibitors you have is *habit*. Our past experiences can inhibit our ability to develop new ideas. We can also be deceived by the success of our past activities.

However, if we live in a dynamic environment what has worked in the past may not work effectively in the future. We need to avoid reacting to problems in certain ways out of habit.

Another inhibitor is *lack of confidence*. Creative people tend to be those people who think that they are creative. If you don't think you are creative, you won't be. And it is not linked to intelligence. Research has generally shown that creativity and I.Q. are not very closely related. There is a correlation up to about the I.Q. range of 110, beyond that there tends not to be any correlation. So, you can't use I.Q. as a "cop out." There is something else besides I.Q. that determines creativity. I think creativity is involved with how one approaches a problem, with how one thinks through a problem.

Now we want to talk about how to approach a problem. The first thing we should do is define the problem. Any problem has two states: where you are now, and where you would like to be. Whenever you have a problem you want to define your starting point and your ending point.

Next, we have to analyze our constraints. What are the things that are going to keep us from getting where we want to be? List these constraints in priority order.

After defining the problem and looking at constraints, the next step is to look at alternatives. Avoid evaluating these as you go along. Brainstorm *first*, then ask what may work. When you're looking at what may work, focus again on where it is that you want to be, and what are the constraints. Remember, the more you focus on where you are now, the less likely you are to get away from there. Think of problem solving like driving an automobile. You spend most of your time looking out the front window, to where you are going. You spend much less of your time looking out the back window, to where you have been. If you spend all of your time looking at where you have been, you are going to run into a tree. It is the same thing with the plan you are developing. If you focus too much on where you are now versus where you want to be, you're not going to get where you want to be.

ALTERNATIVES

Now let's look at alternatives. When you were doing the dot connecting problem, you went through the list of constraints in your head and you probably put in an extra restriction. You decided that you had to stay within the dots. All of your past experience led you to the conclusion that when you are connecting

dots you are enclosing some shape. So all your experience and learning tells you that when you're connecting dots, you have to stay within the line. However, *the solution requires going outside the dots.* I think that very often, in solving problems, we put down more constraints than really exist. You come up with some good ideas and then negate them yourself.

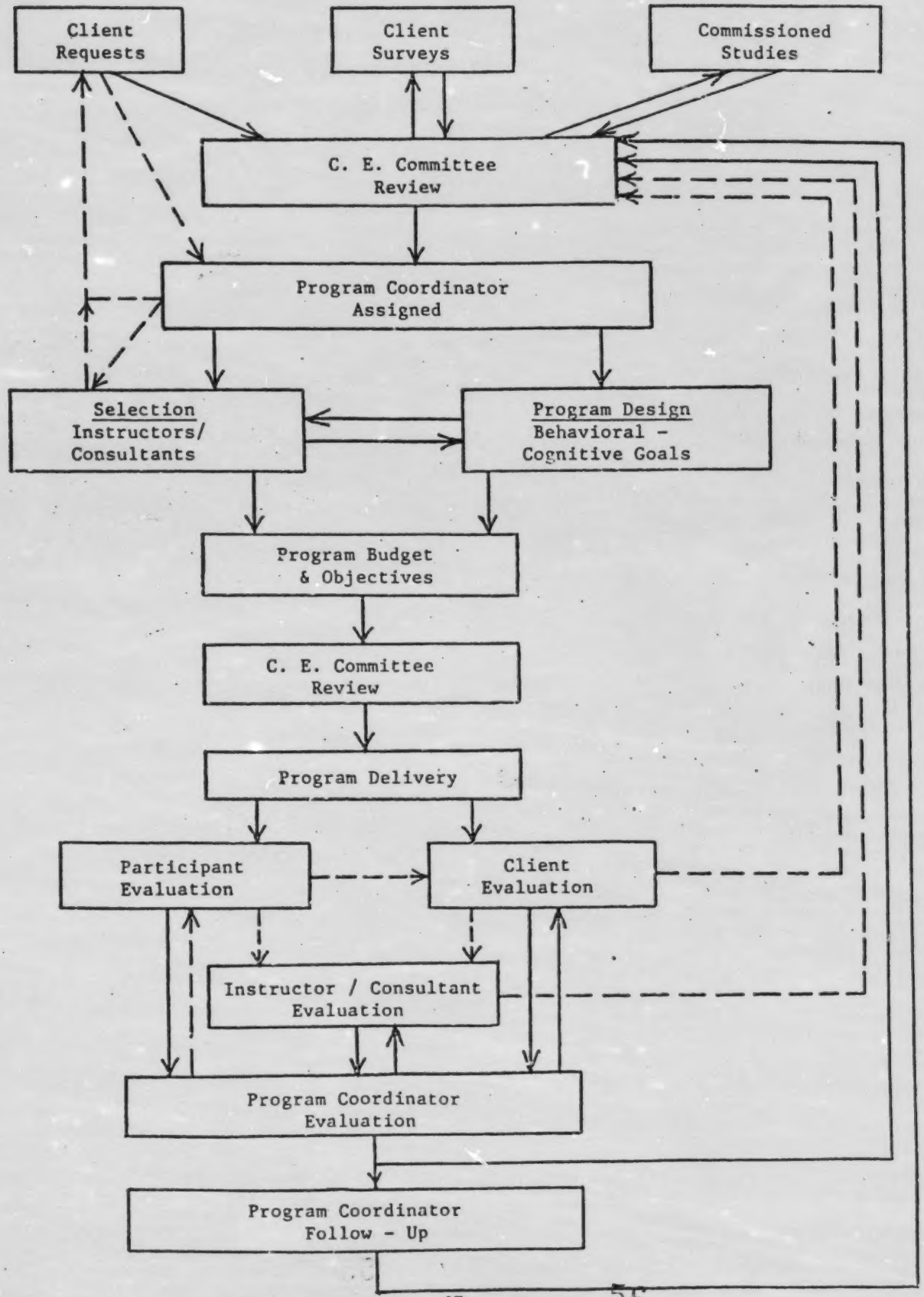
You have to be careful in this process of criticizing your own good ideas. That's habit, and you are putting on fictitious constraints when you do that. I would suggest that you write down your constraints, and check out whether they are real or not.

How one thinks through a problem is of critical importance. Your ability to be successful, to solve your problems in a creative and effective way, will be a function of your developing it properly, focusing in on where you need to be, looking at alternatives without evaluating, then evaluating your alternatives.

SUMMARY

I think that if you are committed to what you're trying to do, then you are going to be successful. Although some of you are pessimistic about the challenges in front of you, you now know enough to get started. My assessment would be that all of you have enough resources to handle your problems.

STATEWIDE CONTINUING EDUCATION MANAGEMENT MODEL - John A. Bachmann, Ph.D.



EVALUATION

by *Muriel Howick, Ph.D.*
Associate Professor, Department of Library Science, Northern Illinois University, and Institute Evaluator

Dr. Howick is the evaluator of the 1979-1980 "Statewide Systems of Continuing Education: New Directions" Institute. In that capacity she has gathered and analyzed data on the Santa Fe workshop program sessions in a mid-year evaluation. The final evaluation encompasses the entire Institute year and is filed with the final report of the Institute to the U. S. Office of Education.

Following are some of Dr. Howick's remarks on evaluation as a process, presented as a seminar during the Santa Fe workshop. She discusses some basic evaluation theories and planning models.

EVALUATION PROCESS

I belong to a group called the Evaluation Research Society, to which evaluators from all kinds of programs belong. Evaluation got a big boost in the 1960's because tremendous sums of money were being poured into social action programs. People began asking how the programs were going, but nobody seemed to know. Some said they were successful; some said they were dreadful. The Federal government decided that if it was going to give money to programs it needed to know the results. It wanted to identify the strengths that could be used the next time. This is, in essence, what I look for in programs.

As librarians, you may not be actual producers of evaluation studies, but you might be consumers. You might be hiring people to do evaluations. Therefore, I'm going to tell you a bit about some basic evaluation theories and discuss certain representative planning models that involve evaluation.

The diagram I use is very similar to other models you've seen here in Santa Fe. As we discuss it I will give you some ideas that you may want to use in your state planning.

EVALUATION MODEL

The model I use includes value formation; goal setting and objective setting; goal measuring; the actual goal activities themselves; implementation--putting the goal activity into operation--and program evaluation. Then you go back and say, "What do we do"; "Where do we want to go next"; and "What strengths do we want to maintain and put into the next program?" Your resources and constraints affect each of these aspects of the model.

VALUES

Each of these aspects is a whole body of literature itself. Let us start with values. Value is a harmonious and consistent relationship between a person's thoughts, feelings, and actions on particular beliefs or issues. You can choose freely and choose from alternatives after thoughtful consideration of each. Those are *knowing* types of things. And the things that affect you more deeply, the things you prize, cherish, and share with others are the *behavioral* ones that you act upon consistently. You do all this work and you make all these plans, but then what happens? A part of what happens is dependent on your value system.

GOAL SETTING AND OBJECTIVES

Now, the goal setting is next. Some people have difficulty with goal setting, some have difficulty with goal measuring, but librarians are really pretty good at program planning. *Assessing* things is something that we sometimes have difficulty with.

Whether you actually verbalized or wrote down what your objectives were in your action plan, you all have some. Sometimes they are a little fuzzy, but you work with what you've got. If you are responsible for getting a group to write their objectives down, first you should brainstorm and just write all of the objectives down for the program you are going to do or for your whole action plan. You write them *all* down. Then, you can usually whittle them down to eight, because often people will say the same things in different ways and eight is an easy number to work with. Read all eight objectives, then come back to number one and make a forced choice of which is the most important objective. As you read them all, one may seem more important than others, or you may think they are all equally fuzzy and not important, but you should assign a number to each objective. You have to consider your objectives, then try to find the ones you can work with. It's so much easier to say than to do.

None of this is easy, but you can think of different ways and different approaches to getting things done. People who feel successful--and seem to get things done--have an inventory of approaches. They don't decide that there is only one way of doing something, and that they will never change that one way. They have a tool bag with various tools that they use. If one approach does not work, they try another way.

Dr. Howick elaborated on how she conducts an evaluation. She represents every program as a straight line, defines the a priori events, the subsequent events, and the variables of the particular program.

EVALUATION OF PROGRAMS

If you are going to hire an evaluator to do an evaluation study, you need to know how to hire an evaluator. Basically, an evaluator collects information and communicates this information to someone else. It's important to know who that someone else is. It is usually a decision maker. The evaluation that I do for this week's Institute workshop, not only will go to the planning group, but it will go to the Office of Education.

The people responsible for this program, for example, have taken a great deal of time in planning and preparing this program. They want to know what is successful so that the next time they don't spend a lot of time working on something that wasn't successful. Then there are the "right-to-know" audiences. This might be you. You might be thinking about doing something in your state, and you want to know the kinds of evaluation variables that were addressed in this particular program.

A priori events might be the kinds of programs that have gone on before or the kinds of systems that have gone on before. Then you come along and decide you are going to *do* something. You decide that there are things that are worth doing because you want something to happen. You can line these things up as your *independent variables*. There are all sorts of things that are going on in any program--in any action plan that you set up. You can't account for them all, so you have to decide the variables that you are going to do something about.

List the priorities and the variables that you think should intervene, and then list the things that you hope will happen. If they do happen, then you consider that the intervention was successful. If they don't happen the intervention wasn't successful. There are also things that you can't account for, and you can call them "spin-offs." There are also certain parameters, resources, and constraints that will effect the evaluation that are outside of your control. In your reporting you indicate that these things happened, and that they may have influenced that evaluation.

GOAL MEASURING

Next is the goal measuring. The best designs for evaluation are those that people call experimental designs, with control groups, but most of us don't have the money to do that kind of evaluation. You can have a credible evaluation without a control group, however.

I believe that there really should be room for judgment on the part of the evaluator. When I get to the end of an evaluation, I describe the *a priori* events, whether goal rating was used toward reaching objectives, or whether this activity or program was part of a bigger plan with objectives already having been delineated. Then I describe the kinds of things I've decided to measure in my evaluation.

I'm going to outline a few things that you can use for measuring--techniques of evaluation. You have to measure attitudes. Someone has said that you really can't believe what people say--that that is not the best way to get information. Look at information with your good common sense. You have to know from whom you are getting your information. When you are talking about attitudes, I certainly don't think many values are going to be changed in a workshop like this. Those are things that take a long time and they have been developing all your life, but you can get some good ideas of what was successful. You can tell by the words people use. You can tell by their actions.

There is something that is called SAVI (Sequential Analysis of Verbal Interaction). It involves taping all of the interactions within a group. It takes twenty hours to learn how to code it, and then it takes 35 hours for every ten minutes of tape. It is really fun, if you have the time and the money. You ask people what they thought was the most important part of the program; what they would change if they were doing it; if they were coming to another one in a year, what kinds of

things would they like to have; what worked for them; what would they never want done again. These have to do with feelings and values and beliefs, and they are derived from participants' reports or interviews.

Interviews are very difficult to do. If you are going to interview people verbally, start out with as few questions as you can manage to get the information you need. The information that you get from people who do dreadful interviews is sometimes very bad information. When someone says that he or she got information through the interview technique, ask who the interviewers were and what their process was.

It is also difficult to conduct group surveys. If you've got a group of people who have a real, special interest, then you may get a good response. Most people consider a 40% response rate really very good.

Logs and journals can work very well for recording evaluation data. I have done evaluations where we set out at the beginning with each person having a diary. We asked them to record a critical event for the day--usually a critical event in the morning and one in the afternoon. I have done it and it has been spectacular. People gave really good thought to what they wrote, and gave great direction for the next set of workshops in a series we were doing around the state.

Another method is observation. This is looking at what the group is doing. Sometimes it is looking at what they produce. There are matrixes of group dynamics, where you look at people and look at how they approach the task orientation. When a group is really functioning well there are people who accept the different roles within the group.

Another type of measuring you usually won't be doing is one of measuring achievement. If you have to get involved in writing questions for certification tests, civil service tests, etc., you can consult books on how to measure achievement. They spell out what the objectives are that you are trying to measure and how to write the test item to do it.

HOWICK'S SUMMARY

The factors that you want to look at in an evaluation process are: the *a priori* events; the critical features of the program; the budget and how it was spent; the time allocations; the groupings; and the level of participant involvement in the program.

Dr. Howick explained that an evaluation of a one-day program requires a totally different approach than one like the Santa Fe workshop--that the kind of program planning required is totally different. She also recommended looking at a program from as many different aspects as possible to gain valid, credible evaluative data.

One thing that I really feel is very important, aside from the actual, credible, written account of something, is that it be reported in a standard style. There are states and programs that have been doing evaluation for years, but nobody knows how to get their hands on them. Consequently, they don't know that the variables they are interested in have already been done someplace else. In contrast, there was a funded program at the University of Southern California for a mental health program evaluation called Data Bank on Program Evaluation. It was all machine readable and there was a data base that could be accessed. You could simple punch in the information you wanted and it would print out an abstract of the program.

If you are going to have an evaluation factor in what you are doing, report it on a standard form so that people can have access to it. Make up your mind that in your state they are going to have standard reporting forms. This should include: the problem addressed; the demographics; the program; and the methodological descriptors.

Remember the case study approach: the *a priori* events; the intervention, what you hope is going to happen; and the subsequent events that you hope will happen.

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Dr. Howick also stressed that she is a participative evaluator and she contends that there is no such thing as a totally bias-free evaluation. She does recommend, however, that the evaluator identify his or her biases.

During the Santa Fe workshop, Dr. Howick administered evaluation sheets for each part of the program. Each program speaker, for example, set objectives for the program and defined activities through which objectives would be met. This was done as part of the program planning prior to the workshop. During the workshop, participants rated the effectiveness of each program. See the following samples:

Sample I

"Participant Program": Prescription
for Situation Downtime: Colleagues SSS"

OBJECTIVE(S)

1. To provide specific opportunity for participants to become acquainted with counterparts.

2. To share with counterparts a report from each participant's situation assessment, both positive and limiting elements.

3. To create a framework which will assist each group in analyzing and comparing assessments to identify activities, problems and developments commonly held, new ideas which are adaptable, or dangers to be avoided.

4. To summarize for the participants in each cluster information and ideas to transfer to team planning.

WAS THE OBJECTIVE ACHIEVED? YES___ NO___

ACTIVITY

3 cluster groupings; 6 group divisions (Subsequently); facilitators.

WAS THE PURPOSE OF THE ACTIVITY CLEARLY COMMUNICATED? YES___ NO___

WAS THE ACTIVITY RELEVANT TOWARD ATTAINMENT OF THE OBJECTIVE?

HIGHLY RELEVANT			NOT RELEVANT	
5	4	3	2	1

Sample 2

"Planning Team Session"

OBJECTIVE(S)

1. Each state's team will have, through sharing of information, clarification, and brainstorming, some concrete data and ideas of the State of Continuing Education in their states.

WAS THE OBJECTIVE ACHIEVED? YES___ NO___

ACTIVITY

2 facilitators for states' teams.

WAS THE PURPOSE OF THE ACTIVITY CLEARLY COMMUNICATED? YES___ NO___

WAS THE ACTIVITY RELEVANT TOWARD ATTAINMENT OF THE OBJECTIVE?

HIGHLY RELEVANT			NOT RELEVANT	
5	4	3	2	1

DAY 2

Sample 3

"Managing the Statewide Continuing Education Process"

OBJECTIVE(S)

1. 1st - Learn a process for effective problem solving;
   2nd - Discuss techniques for assessing continuing education problems

   - Possible Pitfalls
   - A Management Model
   - Assessment Techniques
   - Assessment - A Problem Solving Approach
   - Group Leadership

WAS THE OBJECTIVE ACHIEVED? YES___ NO___

ACTIVITY

Lecture/Discussion; Exercise; Handouts.

WAS THE PURPOSE OF THE ACTIVITY CLEARLY COMMUNICATED? YES___ NO___

WAS THE ACTIVITY RELEVANT TOWARD ATTAINMENT OF THE OBJECTIVE?

HIGHLY RELEVANT	NOT RELEVANT

Sample 4

"Continuing Education Delivery Systems"

OBJECTIVE(S)

1. To discuss the use of technology in continuing education.
2. To demonstrate telefacsimile equipment for continuing education.
3. To prepare audience for technological advantages to teleconferencing to be demonstrated in p.m.

WAS THE OBJECTIVE ACHIEVED? YES___ NO___

ACTIVITY

Quip; Rapifax; Slow scan TV.

WAS THE PURPOSE OF THE ACTIVITY CLEARLY COMMUNICATED? YES___ NO___

WAS THE ACTIVITY RELEVANT TOWARD ATTAINMENT OF THE OBJECTIVE?

HIGHLY RELEVANT				NOT RELEVANT
5	4	3	2	1

DAY 5

CONTINUING EDUCATION DELIVERY SYSTEMS

by *Margaret K. Goggin, Ph.D.*
Professor, Graduate School of Librarianship, University of Denver

Dr. Goggin and Dr. William Rapp, Program Director of TALINET, Graduate School of Librarianship, University of Denver, demonstrated technologies to enhance continuing education delivery during the Santa Fe workshop. They stressed the importance and excitement of combining technologies and equipment to deliver training. Their demonstration was the first to send documents and pictures using Quip II and Slow Scan TV through the Kellogg Bridge, during a teleconference.

TECHNOLOGY AND CONTINUING EDUCATION

There is a growing need to search for and to use newer methods of delivering continuing education. The need arises from increasing demands for continuing education opportunities at a time when costs for transportation, housing, and food are rising and the country is faced with energy shortages. Indications are that these increased costs will continue and become even more severe during the next few years.

The cost of planning as well as executing workshops and seminars is increasing at an alarming rate.

Unless we can find some alternatives to the traditional method of planning and delivering continuing education, we may find ourselves unable to cope with the financial burdens and the people who are most in need of training will not be able to afford the programs.

Technology is ready for our use. While there are few startlingly new inventions, there are many modifications of technology which have reduced the cost, simplified the process, and increased the speed of delivery of information. We have used some of these technologies separately. Our purpose today is to demonstrate the effectiveness of using a number of technologies *together*.

TELEPHONE

We've all used the telephone for communications. The possibilities of wider use of the telephone for continuing education is enhanced by some newer developments. First, is the widespread use of WATS (Wide Area Telephone System), which is subscribed to by more and more state libraries, universities, and businesses, which enables libraries to call within the state or out of state with no cost or little cost to the individual library. The Federal Telephone System allows telephone communication among federal installations at no cost to the individual agency. In addition, there are such long distance line sharing systems as Tymnet and Telenet. All of these systems reduce the cost of long distance communications.

KELLOGG BRIDGE

Another innovation to reduce the cost and make it easier to use the telephone for conferencing is the telephone bridge. Three bridges exist at the present time in Colorado, in Wisconsin, and in Connecticut.

The Kellogg Bridge, which we will use this morning, allows up to twenty parties to dial into the Center and be connected with all others within two minutes for a teleconference, rather than waiting for an operator to call all the parties. Each person may call from any location, may drop out of the conference by merely hanging up, and may re-enter the conference by redialing. Participants may break up into smaller working groups and then rejoin the entire group to discuss results.

Because you can dial direct, your costs are at the lowest direct dial rate for the time of day you call, and if you can use WATS or FTS, your costs are simply the interconnect charge.

A study of NASA's use of teleconferencing, in lieu of travel, reported a savings of approximately three million dollars over a two year period. Participants reported that they accomplished what they needed to accomplish in a shorter period of time through teleconferencing.

For this morning's demonstrations, the Kellogg Bridge will connect the Institute in Santa Fe, New Mexico, with a classroom in the Graduate School of Librarianship and Information Management of the University of Denver, and the Library of the National Oceanic and Atmospheric Administration (NOAA) at Boulder, Colorado. The Kellogg Company in Littleton, Colorado, and Colorado Video, in Boulder, will join the conference at the appropriate times.

PORTABLE CONFERENCE TELEPHONE SYSTEM

Western Electric has built an improved portable conference telephone device for the Bell Telephone Companies which amplifies the telephone voice so that it can be clearly heard by the entire group. For fullest amplification, it can be hooked into your PA system. Two remote microphones enable the audience to ask questions of the distant conferees, and a built-in telephone allows the moderator to speak with others. The model 50A conference telephone equipment will soon be replaced by the model 50B with minor changes for more economical and simpler devices for use. We have a 50A portable conference telephone for use in our demonstration today.

A video cassette training package developed by the SALINET (Satellite Library Information Network) project at the University of Denver with M. K. Goggin as principal investigator and Ruth Katz as program director, will be shown simultaneously at NOAA, the University of Denver (DU), and here at the Institute. At DU and at Santa Fe, a wide screen will be used to enable the entire group to view the cassette from one focal point.

At the end of the cassette, a discussion was held with questions and comments from all three sites using the 50A teleconference equipment at DU and Santa Fe, and the interconnection of all three sites through the Kellogg bridge.

There are occasions during continuing education planning and execution when it would be helpful to send a copy of a page of a document or a picture of the group assembled at each site. Two pieces of equipment will be used to demonstrate these activities.

TELEFACSIMILE

Telefacsimile is a method of reproducing documents at a distance by using telephone communication lines. Telefacsimile systems tend to vary in price, speed and operating procedures. Transmission can vary from 35 seconds a page to six minutes per page, with resolution or clarity of the copy usually greater at slower speeds.

In March of 1979, Exxon Corporation released a new model of the Quip telefacsimile machine, the Quip II, Series 1300. The equipment can deliver a page in two minutes, although the resolution is greater at three minutes. The Quip II sells for approximately $1,300 and can be leased for about $60-62 a month.

Document pages were transmitted between NOAA, DU, and Santa Fe to demonstrate the ease of use of this equipment. With a special modification by Dr. Rapp and Jack Gill of the Kellogg Bridge, it was possible to transmit a page from Santa Fe to all parties on the conference call. This would allow a conference involving twenty sites to have the same document. This is a terrific breakthrough for continuing education.

SLOW SCAN TELEVISION

Slow Scan Television involves the use of a television camera, one or more transceivers, and a telephone line. Since the bandwidth of the telephone line limits the number of images per second that are able to be transmitted, the illusion of motion is not possible with the Slow Scan Television; therefore, the use of this technology involves a series of still pictures.

Glen Southworth, President of Colorado Video, Incorporated of Boulder, Colorado, spoke about some applications of Slow Scan Television which are presently being employed. At this time his company has over 60 slow scan locations in North America, using slow scan television for medical diagnostics. This involves transmitting x-rays of patients for consultation. The technology is also used for environmental monitoring, analysis of weather, etc.

Mr. Southworth felt that the major common denominator for the use of slow scan television was the solving of problems, with one office communicating with another to make decisions. By linking the Slow Scan TV through the Kellogg Bridge, the TV image can go to all connecting sites at the same time.

Thus all parties can see and discuss the same image, regardless of the location of the various conferees. This demonstration, as with the Quip II, was the first time transmission was made through the telephone bridge, and demonstrated the possibility of innovative and creative linking of present technology to deliver information in new ways.

THE FUTURE

Dr. Rapp presented a view of possibilities for the future. Within a few years there could be a linkage of the telephone bridges around the country which could multiply the number of participants in a teleconference to perhaps as many as three or four hundred sites.

It will be possible for a continuing education program to make the top expertise in the country available at certain stated times and allow people to dial into the bridge from wherever they are to ask questions and discuss problems.

The use of satellites to provide programs of continuing education is near at hand. Such groups as the Public Service Satellite Consortium have been organized to assist library agencies and other educational organizations in using satellites effectively. There are other possibilities such as electronic mail and overnight mail deliveries which have implications for librarians and libraries.

One of the problems we all face is the need to keep up-to-date on new developments in technology and new uses of present equipment. Perhaps a useful service might be a library technology hotline to keep all of us informed about what is happening in this dynamic field!

Alternative Delivery Modes for Continuing Education: An Annotated Bibliography was prepared and compiled by Elizabeth W. Stone, for the 1979-1980 CLENE/USOE Institute.

This bibliography includes introductory material on adult learning and alternative modes for delivering continuing education, marketing of continuing education programs, home study, distance learning and correspondence study, the use of audio tape cassettes and telecommunication technologies as delivery modes of continuing education: instructional TV, closed circuit TV/ITFS (instructional television, fixed service), video tape, cassettes, videodisks, satellites, radio and telephone. Copies are available from CLENE, Inc., 620 Michigan Avenue, N.E., Washington, D.C. 20064.

This bibliography is now being edited and the text expanded for publication by the American Library Association.

CLENE VOLUNTARY RECOGNITION SERVICE

by *Micki Jo Young, Ph.D.*
Principal Investigator
National Council on Quality
Control Library Education

Quality of continuing education was a major theme of the 1979-1980 Institute. Institute participants were invited to serve as a pilot group to test the new CLENE Recognition Service by entering their Institute experience in the system.

INTRODUCTION

In recent years there has been an increased interest in continuing education among members of the library·information·media community. As a result of the rapid changes in technology and the varied pressures put on administrators, people sought means to keep up with these new developments and looked to continuing education activities. The quality and effectiveness of these activities were very uneven. Some were overpriced, a waste of time and effort, while others were top-notch offerings. There was a call from the profession for something to be done to upgrade the quality of the continuing education offerings and to institute a means for a person to identify program worth "before the fact."

Also, the increased participation in continuing education activities left people with a drawer full of letters of completion, CEU certificates, and cancelled checks to document their efforts. And there was no measure to indicate if the amount of their completed activities was average or significant in terms of what their counterparts were accomplishing.

This, then was the environment in which the CLENE Voluntary Recognition Service was created. CLENE, Inc., the national organization with its chief mission being the advancement of continuing education for all library·information·media personnel, was the natural parent for this service. A research project was funded and a model for a voluntary recognition service was designed. A national conclave was held to review the model and provide opinions and comments from the field. A task force was

formed within CLENE to coordinate the development of the service. A second research project was funded and a contract was negotiated with a national support organization. The service was then in place.

WHAT IS THE VOLUNTARY RECOGNITION SERVICE?

The scope of the voluntary recognition service is twofold: it provides a mechanism for recognizing educational attainment and builds a system for encouraging better quality continuing education activities. There are five areas that are implemented as four separate components.

The five areas are:

1. Criteria for Quality continuing education
2. A system for the approval of providers of continuing education who effectively apply the Criteria
3. A national recordkeeping mechanism for an individual's participation in continuing education activities
4. A Statement of Acknowledgement of participation in continuing education at a specified level expressed in number of contact hours
5. Support services for the individual participant and for the providers of continuing education.

The four components of the CLENE Voluntary Recognition Service are:

1. The CLENE Provider Approval System
2. The CLENE Library·Information·Media System National Continuing Education Registry
3. The Statement of Acknowledgement for Continuing Education
4. Support services provided by CLENE, Inc.

The entire recognition service is *voluntary* for both the individual participants and the providers. Providers are urged--but not required--to apply for approval. Individuals choose whether or not to enter their activities in the recordkeeping system; they decide when to have a transcript of their activities generated; decide who is to receive the transcript; and, they decide whether or not to apply for a *Statement of Acknowledgement for Continuing Education*.

THE PROVIDER APPROVAL SYSTEM

The purpose of the Provider Approval System is to identify continuing education activities that should have an acceptable level of quality. The basis is the Criteria for Quality which are used in a review and approval process to measure and predict quality in the offerings.

Quality continuing education offerings must be based on careful planning. The Criteria for Quality incorporate a number of factors that can be used in assessing the planning, design, delivery, and evaluation of a continuing education offering. There are criteria for *specific types* of continuing education programs and activities, e.g., group programs and activities; individualized programs and activities; and instructional materials. There are also criteria for types of continuing education *providers*, specifically those who provide activities for groups and those who serve as Learning Consultants on a one-for-one basis.

Each criterion is accompanied by *assessment* factors which illustrate the scope of the criterion and suggest the level or degree to which each should be applied.

Example:

> CRITERION 1 for Group Programs and Activities: The specific needs of the client group have been assessed.

Assessment Factors:

1. Has the target group been clearly identified?
2. Has a systematic needs assessment been conducted?
3. Have representatives of the target group participated actively in the needs assessment process?

The Provider Approval System is administered by a Council made up of members of the library·information·media community with expertise in continuing education program planning and development. Providers of continuing education activities apply for approval by submitting information and documentation about their program or activities that illustrate that these activities meet the Criteria for Quality. The Council reviews the application and decides whether the Criteria have been met at an accepted level and, if so, awards "Approved Status" for that program or activity.

There are three categories of approval:

1. *Single Offering.* A provider may apply for approval of a specific offering or activity.

2. *Organizational.* A provider may apply for approval of all the activities and offerings in its entire continuing education program. This type of approval emphasises the provider's *administrative* structure and resources to determine its capability and willingness to apply the Criteria to each of its offerings.

3. *Learning Consultant.* A person may apply for approval to work as a Learning Consultant with individuals in one-to-one independent learning activities.

BI-LEVEL APPROVAL SYSTEM

The system calls for a bi-level approach to approval as opposed to centering all approval authority in the national group. It is strongly urged that states or multistate regions form councils to be an integral component in the coordinated, national Provider Approval System. State or Multistate Councils will apply to the National Council for approval to serve as delegates of the National Council to review and approve (1) single offerings in that geographic area; (2) learning consultants in that geographic area, and (3) organizational applications from local organizations and agencies.

The bi-level approach enables a local area to incorporate into its criteria any requirements peculiar to that state or region, e.g., to accomodate certification or re-certification requirements. It spreads the volume of work involved in review and approval over a wider area but allows consistency and evenness

among the various approving bodies. It allows for closer contact between the providers and the approving body. This will expedite communications and monitoring. In states or regions without a council, all approval will be handled by the National Council.

Approved single offerings or offering from approved organizational providers and learning consultants will be identified with a statement of approval and/or the Voluntary Recognition Service logo. This should be an aid to person reviewing what is available in continuing education activities and deciding in which activities to participate.

THE CLENE NATIONAL CONTINUING EDUCATION REGISTRY

Throughout the entire design phase of the Voluntary Recognition Service, attention was given to the systems and procedures of other professions such as the systems operated by the American Medical Association, the American Psychological Association, and the American Institute of Certified Public Accountants. It was learned that a recordkeeping system for continuing education participants at a national level had been developed and was available on a service fee basis.

The American College Testing (ACT) Program National Registry is a continuing education recordkeeping service for professional associations, institutions, and individual practitioners which meets the need for a central, computer-based, depository of continuing education records. CLENE, Inc., has signed a contract with ACT and the CLENE National Continuing Education Registry is part of the ACT National Registry.

The basic purpose of the Registry is to maintain an orderly national record of a person's learning activities. It is similar to the service provided by a college or university registrar's office which maintains files and issues transcripts.

Participation in the CLENE National Continuing Education Registry is completely voluntary. Each person decides whether or not to enter a record of his or her participation in an activity or offering. A student data form is filled out for each activity and fee of $3.00 is paid to enter a record. Providers of continuing education activities are urged to cooperate with the National Registry and coordinate the filling out of the forms, the collection of the fees, and the transmitting of the forms to the Registry office; however, the individual participant can enter a record of activities whether or not the

provider performs this service. Independent, nontraditional activities can also be entered by an individual learner. These activities include, but are not limited to: writing articles, consulting, teaching courses, preparing A-V presentations, or presenting papers at conferences.

Persons wishing to have transcripts of their recorded activities, should send a transcript request form and the $6.00 fee to the Registry office. The Registry will send the transcript to whomever the person specifies.

STUDENT EVALUATIONS

Providers get class rosters and reports of student evaluations for each offering or activity. CLENE gets annual statistical reports that give summary totals on continuing education participation nation-wide. This will be an excellent planning and research resource.

THE STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION

As is true with other professions, CLENE will offer for the library·information·media profession a *Statement of Acknowledgement for Continuing Education.* Whether or not a person wishes to apply for a *Statement of Acknowledgement* is strictly a personal decision and is entirely voluntary.

The *Statement of Acknowledgement* recognizes that a person has participated in a minimum of 120 contact hours of continuing education activities during a three year period. There are seven categories of continuing education activities that are applied to the 120 hour total with certain categories required at a minimum level and others limited at a certain level. This is to assure that the *Statement* represents broad, balanced participation by the person.

The categories and their limits are described in the following table:

CATEGORIES FOR THE STATEMENT OF ACKNOWLEDGEMENT FOR CONTINUING EDUCATION

CATEGORY	DESCRIPTION	CONTACT HOUR LIMIT
1.	All activities approved by the National Council on Quality Continuing Education or approved State or Multistate Councils of Continuing Education. This includes approval of an organization for its total program; approval of a single offering; and programs planned in concert with an approved Learning Consultant. Important note: For the calendar year prior to and including 1980 activities that were awarded academic credit or Continuing Education Units (CEU's) may be entered into this category.	No Limit 40 contact hour minimum
2.	Academic credits and CEU activities with Non-Approved Sponsorship.	40 hours
3.	Informal Group Activities, e.g., association programs, journal clubs, and lecture series.	30 hours
4.	Informal Individual Activities (15 contact hour limit in each subcategory): -A-V kits -modules on interactive technologies -programmed instruction -personal reading -newspaper courses -self-assessment -tutorial/consultation -home study or correspondence courses -independent study	30 hours
5.	Papers, Publications, Books, Exhibits, Consulting, Teaching.	40 hours
6.	Association Activities, i.e., holding an elected office or serving as a committee chairperson.	20 hours
7.	Other Meritorious Learning Experiences	20 hours

The person fills out an application, which breaks down the activities by category; requests a National Registry transcript be sent to the CLENE office; and remits a fee if a non-member of CLENE. After the application is processed and verified, a *Statement of Acknowledgement for Continuing Education* is issued to the person.

The next three year cycle begins with the date of the application and any activities undertaken after the date of application apply to the next *Statement*. If 120 contact hours are earned in the proper categories in less than three years, the person can apply as soon as that total is reached; however, one may not exceed the three year time limit to accumulate 120 contact hours. There is no limit on the number of *Statements* one can earn.

SUPPORT SERVICES

To further the concept of the Voluntary Recognition System and supplement the major components, it requires certain support services which will be provided by CLENE itself.

The CLENE Task Force on Recognition Systems will continue to advise and coordinate the various components of the recognition service and will be responsible for promotion of an education program for the Voluntary Recognition Service.

SUMMARY

In summary, the major attributes of the CLENE Voluntary Recognition Service are:

- The voluntary Recognition Service is for everyone who works in or with library·information·media services.
- The Service is *voluntary*.
- The Voluntary Recognition Service is *not* limited to members of CLENE.
- The Criteria for Quality can be used to plan continuing education activities and offerings whether approval is sought or not.

- The Criteria for Quality can be used by an individual as a guideline to assess the quality of activities in which he or she may wish to participate.

- The national components of the Voluntary Recognition Service will seek to be compatible with other related programs at the state and national level.

* * * * * * * * * * *

Dr. Ruth J. Patrick, Assistant Director, University Libraries, Wayne State University, and member of the Council on Quality Continuing Education participated in the Santa Fe workshop through teleconferencing. Dr. Patrick prepared materials, presented a lecture, and conducted a multimedia presentation for the Institute participants on the Recognition System for Library·Information·Media personnel.

Dr. Bernard Franckowiak, who serves on the Institute Advisory Board as well as on the Quality Continuing Education Council, "brought" Dr. Patrick to Santa Fe during his program entitled "Continuing Education in the Real World." He and Dr. Elizabeth Stone, Project Director for both the Institute and the Quality Continuing Education Project, were the "on site" Santa Fe facilitators with Dr. Patrick. This teleconference, complete with slides prepared by Dr. Patrick prior to the workshop, was a demonstration of an effective and successful "alternative delivery system" in continuing education.

WESTERN COUNCIL OF STATE LIBRARIES

by *Anne Marie Falsone,*
Assistant Commissioner
Colorado State Library

The Western Council was formed to meet two main needs not being met, or not being met as fully as they could be. One was to have a forum for addressing similar kinds of concerns among the states west of the Mississippi River. (Eighteen of those twenty-three states belong to the Western Council.) The other major need to be met was provision of continuing education.

This presentation was part of the program on "Continuing Education the Real World" during the Santa Fe workshop and addresses some regional concerns of Western states.

In most of our states we have one public library consultant, at the state library. Or we have one person doing continuing education, or we have one institutional person. In some of our small states we have one person who's doing public library consulting, institutional consulting, and continuing education, all at one time. The Western Council planners wanted to provide an opportunity for these persons to be able to talk to people who do the same kinds of things they do so that they don't burn out and wind up doing the same kinds of things they did in 1964 because they don't have any new ideas.

How do we accomplish these purposes? We've had a series of institutes, and we have some more on the drawing board. We held an institute for governmental reference staff, since most of the state library agencies have as one of their goals the provision of reference services to agencies of the state government.

We had a very successful meeting for our institutional consultants, and we've just completed the second phase of a library development conference. This was for library development consultants and was on consultant skills.

We have written a grant to National Historic Preservation Records Commission (NHPRC) to do a survey of the needs for preservation and conservation of materials in the West. After this is done, we are going to decide what to do about it. We think the first step is to find out what the problem really is in preservation and conservation before we suggest "solutions."

For 1980 we are planning a telecommunications program. We also have a staff exchange program which is ongoing. What this does is reimburse one staff member from the State Library to choose any other State Library they want to visit. We also put out a listing of what is available, for example who is doing what, that a person may want to see. The funding for this comes out of the membership fees, and there is funding for every state library to do this each year. We have two years of Staff Exchanges behind us.

The way that the Staff Exchange Program works doesn't require a lot of administration by the Council. The Continuing Education Committee of the Western Council asked the states to indicate what is special about their state operations and what would be of interest to other states and submit to the Committee an inventory of these things. This data was compiled and sent to all the Western Council members.

This has helped us to determine which persons on our staff would benefit from exchanging with which state. We were responsible for making the contracts. In addition, one of the really good things that has come out of the Western Council's institutes and exchanges, etc., is that you really get to know your counterparts in other states. This is invaluable in strengthening regional cooperation.

We have a committee that is now studying networking and resource sharing, jointly with the regional network directors who sell us the computerized services, such as CLASS in California, AMIGOS in the Southwest, BCR in the Rocky Mountain area. Altogether there are five networks that are dealing with this committee.

The committees that are working on programs typically include one state librarian as liaison. The other people on the committee, which may be three of four in number, are state library staff members. So this gives the staff a chance to get involved in some of these activities.

The Western Council is an outgrowth of WILCO, which is Western Interstate Library Cooperative, which was part of WICHE, the Western Interstate Commission on Higher Education. At some point we decided to spin off on our own because we thought the overhead costs we were paying were getting expensive. We have republished some of the WICHE/WILCO publications, such as Networking in the West. We also have the ACCESS tapes, which were developed at the University of Denver a few years ago. We make those available free of charge to our members, and at a small fee to non-Western Council members. They are available through the Colorado State Library in Denver. We have also published a proceedings document from the institutional consulting workshop. We also have a newsletter for institutional consultants, as a result of their workshop.

QUESTION PERIOD

Q. What kind of fee is attached to a membership?

A. $3,000 annual membership.

Q. If I am a librarian in a state which belongs to the Western Council, what benefits do I have?

A. If you are a librarian in a Western Council state, I think that there are some indirect spin-offs from the fact that, hopefully, your state library staff is becoming more aware of what's happening regionally. They are going to some of these conferences that we are doing. If they are not coming home and sharing with the people in the field, then the next time you run into some of them you might want to ask them why they are not sharing. I think this sharing is very important, and that is what we hope is happening.

Q. When you are doing workshops, etc., who coordinates them? Do you designate one state librarian, or do you, as a Council, get together and plan, or do you come up with some kind of team from your state library staffs?

A. We have done all of the above. When we decide there is a need for something, for example, some sort of a workshop or activity for library development consultants, a committee works on it. For the committee on library development consultants, I was the state librarian liaison to

the committee, and there were about four or five library staff members from other states, not Colorado. We were going through some processes to try to decide what kind of activity we could do and determine what would be meaningful, what do the people need, where do we find the people to do it? At about that time, an announcement of a workshop that Sara Fine was doing in Pittsburgh and in Denton crossed my desk. When I looked at the objectives, they were almost exactly what the committee had come up with as the objectives for our workshop. There are times when it just doesn't pay to do your own thing. So, after a phone call to Sara Fine to determine the kind of enrollment she was looking for in Denton, we identified one person from each of our member states to attend the workshop. On that particular occasion we took a package that was already developed, which we thought would be good, since we knew Sara, her background, and the kind of program she would provide. On the Government Records workshop that we had, we actually sat down and worked with a design team. The team decided what kind of program they would have, they invited the speakers, and took care of all the details.

Q. Do you pick geographic locations so that sometimes there is something in Montana or Washington, and the next time in Arizona or Nevada, for example?

A. Yes. For example, the Instititional workshop was in Reno, the Consulting one was in Denton, and the Government Records one was in Denver. We also vary the locations of meetings of the Western Council.

FAREWELL TO SANTA FE

by *Anne Marie Falsone*
Assistant Commissioner
Colorado State Library

I would like to share some ideas generated by the workshop speakers. Hopefully, this sharing will trigger some thought processes of your own which may remind you of things that you have heard and that you can take back with you.

Brooke Sheldon pointed out that continuing education is not an end in itself. I think that we can get so tied up in continuing education that it isn't seen as part of a large picture of what is being done in our states' library development, or regional planning. Obviously, the reason why you are trying to help people further their skills is so that you can implement larger goals which your state identifies. What Brooke said made me think that we can get so caught up in continuing education for its own purpose that we forget what the ultimate goal is--that of helping people upgrade their skills.

John Bachmann said that our clients don't always know what they need. I have been talking to some of the regional system directors in Colorado about this recently. When people call and ask for a workshop on how to repair books, what they really need are management skills to learn how to convince their city council or county commissioners that they need a larger book budget. Then they wouldn't have to spend so much of their time repairing books purchased in 1944.

John Bachmann also made a point that in problem solving, you have to focus on what you want as a solution, not on the problem. I'm sure that I'll be conjuring that up for years to come. I think that we all do that; we just get so caught up in what the problem is that we forget what it is we're looking for. John also pointed out that if you look at the spectrum, there are so many possible solutions, that you could spend the rest of your life just considering the variations and alternatives. But, if you look at the end product--what it is you want to improve--the number of alternatives is usually much smaller. That is something that I'm going to really take back and massage through the brain cells and see what it does for me in Colorado.

Finally, I'd like to share one idea with you, one that I picked up at a meeting some five or ten years ago. "Living is not a spectator sport." I think that when you have this nice document, you make sure that you don't go home and just sit and look at it. You've got to do something. I hope that you'll take your draft home, talk to your friends, but keep in the back of your mind, that writing and implementing a continuing education plan is not a spectator sport!

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This farewell message concluded the Santa Fe workshop. State teams returned home with the action plans developed during the week and began the process of carrying out their planning strategies.

POSTWORKSHOP MEETINGS

Three follow-up meetings to the Santa Fe workshop were planned for Institute participants and Advisory Board members. The first and third meetings were planned to coincide with the American Library Association (ALA) Mid-winter Meeting and Annual Conference, respectively. The second meeting was held in conjunction with the annual conference of the Association for Educational Communications and Technology (AECT). A synopsis of the program matter addressed during the postworkshop meetings follows:

SELF-ASSESSMENT AND LEARNING CONTRACTS

Postworkshop Meeting #1
January 21, 1980, Chicago, Illinois

The first meeting after the Santa Fe workshop included a program and written materials on Self-Assessment and Learning Contracts prepared by Eleanor Biscoe, Institute Program Director.

Deanna Marcum, formerly Training Program Specialist with the Association of Research Libraries, Office of Management Studies, now a Senior Consultant with Information Systems Consultants, Inc., conducted a mini-workshop with Institute participants entitled: "Self-Assessment: Methods for Trainers." Highlights of her remarks and suggestions follow:

"Self-Assessment for Life and Career Planning" is the assessment tool Mrs. Marcum used to demonstrate how individuals can benefit from involvement in a self-assessment program.

For background, she described organizations being composed of three layers or concentric circles: (1) the outer circle--the environment over which the individual has no control and cannot change; (2) the center circle--the climate of the organization, the atmosphere in which people work and are involved in decision making; and (3) the internal circle--where people do have control and can progress in their careers. *It is in the third layer that persons can make decisions and change courses of their careers.*

Using a self-assessment tool, persons can answer questions such as: What am I now doing and what do I want to do? This analysis must be done in the context of what is *really* possible, however. Otherwise, unrealistic expectations may develop.

Mrs. Marcum demonstrated the use of the form to analyze present situations and plan for future learning in terms of a total career plan. Life planning, however, goes beyond strictly career planning.

Mrs. Marcum outlined some benefits of using the life and career planning tool:

-- it helps to identify training needs and gaps between what is now and what is sought in the future
-- it is a positive career development strategy to use with persons at various levels in an organization
-- it can be used effectively in the performance evaluation process.

Written materials and sample self-assessment and learning contracts may be obtained from CLENE.

EDUCATIONAL APPLICATION OF SATELLITE TECHNOLOGY

Postworkshop Meeting #2
April 22, 1980, Denver, Colorado

Rick Williamson, Media Director of Bethany College, West Virginia, and West Virginia State Coordinator of the Appalachian Community Service Network, spoke at the second Institute meeting following the Santa Fe workshop. Mr. Williamson demonstrated satellite transmission capabilities with transparencies, video-taped materials, and lecture. His multi-media presentation demonstrated the educational technology in a continuing education activity.

"The Satellite Era of Continuing Education," Mr. Williamson said, "is here now and is skyrocketing." He and the Institute participants discussed continuing education programming and the need for evaluation of programming. In addition, he pointed out that satellite space is crowded now--that the demand

for satellite use is growing and "parking space" problems exist. The cost of satellite time has decreased and is much less expensive than using land lines.

Numerous issues surrounding continuing education via satellite were discussed. Some problems included copyright, spill over, free loading, space reservation, control, program production, frequency overload, technology replacement, needs and rights of audiences, educational content and rates, lack of legislation governing satellite use, and commercial advertising.

Satellite transmission is successfully employed, however, in educational programming. One example is the transmission of the program "Video-disc and Education" conducted live during the AECT conference and made available to groups throughout the United States.

Mr. Williamson may be contacted for additional information on satellite technology and delivery of continuing education.

HITHERTO AND HENCEFORTH: MAKING TOMORROW HAPPEN

Postworkshop Meeting #3
June 28, 1980, New York, New York

The final program schedule of the 1979-1980 CLENE/USOE Institute includes a send-off speech by William Asp, Director of the Office of Public Libraries and Interlibrary Cooperation, Minnesota Department of Education, and Chairman of the Chief Officers of State Library Agencies (COSLA). Mr. Asp serves as an ex-officio member of the Institute Advisory Board.

A transcription of Mr. Asp's speech will be made available through CLENE after July 1980. His topic addresses the follow-through measures necessary to carry the Institute year's work forward in the states. The Institute grant is, after all, a springboard for persons committed and dedicated to continuing education for library.information.media personnel to exercise leadership in the statewide planning and implementation of continuing education.

STATUS OF STATE PLANNING FOR CONTINUING EDUCATION

by *Mary Baxter*
Research Associate
1979-1980 USOE/CLENE Institute

As part of the final stages of the 1979-1980 Institute year, I conducted a survey to determine the status of continuing education in each state. I collected information through phone calls to state library agencies, and used documents housed in the Institute Office to answer two major questions: 1) Is continuing education included in the LSCA or Long Range Plan of the state; and 2) Is there a separate continuing education plan for the state?

Although the chart on page 87 shows the responses to these questions, it cannot reflect the actual status of continuing education development in the states. To do this accurately would be beyond the scope of this survey. However, the following information can serve as an indication of how states are responding to the continuing education needs of library personnel.

In accordance with the second mission of the Continuing Library Education Network and Exchange (CLENE): "To create an awareness and a sense of need for continuing education of library personnel on the part of employers and individuals as a means of responding to societal and technological change," the purpose of the three Institutes funded by the U. S. Office of Education has been to promote and advance the cause of continuing education within the states. Evidence that this has been successfully accomplished in many states is:

1) there is an increased awareness of the need to provide leadership for continuing education within the state as demonstrated by the fact that forty-one states and one U. S. Territory (Guam) have participated in one or more of the CLENE/USOE Institutes;

2) many states' Governor's Conference on Library and Information Services resolutions include provision for continuing education for library personnel within the state;

3) many states have an increased level of cooperation among the state agency, the state library associations, and the educational institutions within the state.

In many cases, the impetus and the strategies for planning change were initiated or advanced during the course of participation in a CLENE/USOE Institute.

As illustrated on page 87, some of the states have a separate plan for continuing education on a statewide basis. It should be noted, however, that those states in the planning stages indicated in the survey that actual "planning" ranges from the writing of a first draft of a proposal or a position paper, to a completed plan awaiting approval by the proper body.

Another point of clarification regarding the inclusion of continuing education in the LSCA or Long Range Plan is that in some states continuing education is viewed as a strategy for reaching certain goals and achieving specific objectives. In other states it is a high priority, in and of itself, with a specific section on continuing education written into the plan.

During the course of many telephone conversations, I became aware of the diversity and the uniqueness of the activities and planning processes that are being carried out in the states. Many respondents indicated that the climate for action in continuing education is right, and that support is growing. Continuing education has not "come of age" yet, but in many states it is being seen as an important and integral component of library development, aimed at increasing the awareness and skills of library personnel, and ultimately, providing better service to library patrons.

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STATUS OF STATE PLANNING FOR CONTINUING EDUCATION

	CE in LSCA Plan	CE not in LSCA Plan	Separate CE Plan	Separate CE Plan in Preparation		CE in LSCA Plan	CE not in LSCA Plan	Separate CE Plan	Separate CE Plan in Preparation
Alabama[1]		•		•	Montana[1]	•		•	
Alaska[1]	•			•	Nebraska[1]	•			•
Arizona[1]	•			•	Nevada[1]	•			
Arkansas[1]	•			•	New Hampshire	•			
California[1]	•				New Jersey[1]	•		•	
Colorado[1]	•			•	New Mexico[1]	•		•	
Connecticut[1]	•				New York[1]	•			
Delaware[1]	•				North Carolina[1]	•			
Florida[1]	•			•	North Dakota	•			
Georgia	•				Ohio[1]	•			
Hawaii	•			•	Oklahoma[1]	•		•	
Idaho[1]	•		•		Oregon[1]	•		•	
Illinois[1]	•				Pennsylvania[1]	•		•	
Indiana[1]	•		•		Rhode Island[1]	•			•
Iowa[1]	•				South Carolina	•			
Kansas[1]		•	•		South Dakota[1]	•		•	
Kentucky[1]	•				Tennessee[1]	•			
Louisiana[1]	•		•		Texas[1]	•		•	
Maine[1]	•				Utah		•		
Maryland[1]	•				Vermont[1]	•			•
Massachusetts[1]	•				Virginia	•			
Michigan[1]	•		•		Washington[1]	•			
Minnesota[1]	•				West Virginia	•			
Mississippi	•				Wisconsin[1]	•			•
Missouri[1]	•				Wyoming[1]	•		•	

[1] Indicates participation in one or more CLENE/USOE Institutes.

PERSPECTIVE FROM A SEASONED PROJECT DIRECTOR[1] OF THREE CLENE/USOE INSTITUTES

by *Elizabeth W. Stone, Ph.D.*
Project Director

> Continuing Education must become an integral part of all library activity in all libraries. It should not be viewed as an added component, apart from normal endeavor, an end in itself; something extra indulged in if there is time and money.
>
> This will require philosophic acceptance, understanding and commitment to action on the part of individuals who work in libraries, or administration and governance of libraries, of those who educate librarians, and of their professional organizations.[2]

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[1] The implementation of the three CLENE/USOE Institutes (1976-1977; 1978-1979; 1979-1980) would not have been possible without the cooperation of many individuals concerned with improving continuing education opportunities for library-information-media personnel for the purpose of delivering quality library and information services to all residents of our nation. The Continuing Library Education Network and Exchange (CLENE) in cooperation with the Department of Library and Information Science, The Catholic University of America, brought people, materials, and funds together. The Institute Advisory Boards, evaluators, resource individuals, and staff all made contributions far beyond the basic requirements set forth in the proposals for each Institute. A listing of these persons, by Institute, is appended to this report.

[2] Elizabeth W. Stone, Ruth J. Patrick and Barbara Conroy, Continuing Library and Information Science Education: Final Report to the National Commission on Libraries and Information Science (Washington, D.C.: Government Printing Office, 1974), p. 2-83.

This statement by Allie Beth Martin, written in 1973, accentuates the fact that continuing library education is becoming an essential phase of the lifetime education of all those who work in or with libraries, information, or media centers. But this stage is being reached amidst a considerable amount of turbulence surrounding the development of continuing education for the profession.

ISSUES

Some of the continuing education issues include: the need to provide quality library and information service to the public; adequate provision of continuing education to meet criteria for quality; role definition of all involved in providing or participating in continuing education; the problem of finding adequate resources to offer sufficient learning opportunities for the total library·information·media population; the problem of finding appropriate alternate delivery systems for continuing education; the issue of mandatory vs. voluntary continuing education; the humanistic elements associated with the concept of continuing education being the responsibility of every practitioner; the establishment of universal record systems for proof of participation in continuing education activities; the problem of recognizing those who participate in continuing education; identification of providers who offer quality programs; and, the problem addressed by all three of the CLENE/USOE Institutes--how to plan and implement *statewide* systems for continuing education which will coordinate existing resources in the state or territory.

WHY THE STATEWIDE APPROACH

From the inception of the Continuing Library Education Network and Exchange (CLENE) it has recognized that states are the keystone of a national information network--that state library agencies can and should play a central role in the development, provision, and coordination of continuing education for the profession. Due to their unique position, state library agencies influence and determine library·information·media service levels, both qualitatively and quantitavely, the national, state, regional, and local levels.

The case for the importance and need for the state library agencies to provide leadership in their multi-faceted roles has been made numerous times. In 1969, the National Advisory Commission on Libraries placed emphasis on the

importance of state library agencies in the development and coordination of *ALL* library resources and services within the state, including those in school, public, academic, and special libraries.[1] The 1970 *Standards for Library Functions at the State Level* state "the state library agency should promote and provide a program of continuing education for library personnel at all levels as well as for trustees."[2] These standards suggest that the achievement of this goal may be attained through cooperation with library schools, professional associations and sponsorship of meetings and workshops.

The 1973/1974 survey sponsored by the National Commission on Libraries and Information Science (NCLIS), cited eight reasons why the states were a central factor in building a strong national continuing library and information science education system. Of those interviewed during the survey for that report, 42% believed that state library agencies would play the chief role in the development of continuing education for the profession.[3] NCLIS also issued a statement on September 25, 1975, entitled "Resolution on Strengthening State Library Agencies" which specifically identified the U. S. Office of Education as the *federal focal point* for providing leadership training for state library agencies:

> The National Commission hereby affirms the key role of the states in the provision of library and information services to all Americans, and requests the U. S. Office of Education to strengthen the state library agencies by providing leadership training and other technical assistance specifically designed to encourage and enable the states to increase their statewide support and responsibility for library and information services.[4]

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[1] Douglas M. Knight and Shepley Nourse, eds. Libraries at Large: Tradition, Innovation, and the National Interest. (New York: R. R. Bowker Co., 1969). pp. vii, 400.

[2] American Association of State Libraries, Standards Revision Committee, Standards for Library Functions at the State Level. Rev. ed. (Chicago: ALA, 1970).

[3] Op. cit., pp. 13--3-15.

[4] National Commission on Libraries and Information Science, "Resolution on Strengthening State Library Agencies," to the U.S. Office of Education, Office of Libraries and Learning Resources, September 25, 1975.

The Office of Education, through the Office of Libraries and Learning Resources, accepted this challenge and granted Title II-B funding for the first CLENE Institute to implement and/or strengthen statewide system of continuing education for library·information·media personnel in 1976-1977. This was followed by two other year-long Institutes: one in 1978-1979, and one in 1979-1980.

WHAT WERE THE INSTITUTE GOALS?

All three state Institutes have had one overall common goal--to facilitate state library agencies in the implementation and/or strengthening of statewide systems of continuing education for library·information·media personnel, and coordinate existing state resources. A specific common objective of the Institutes was to develop, refine or review a written plan to result in a statewide system for continuing library·information·media education. Continuing education plans were to be integrated with library development plans in the states.

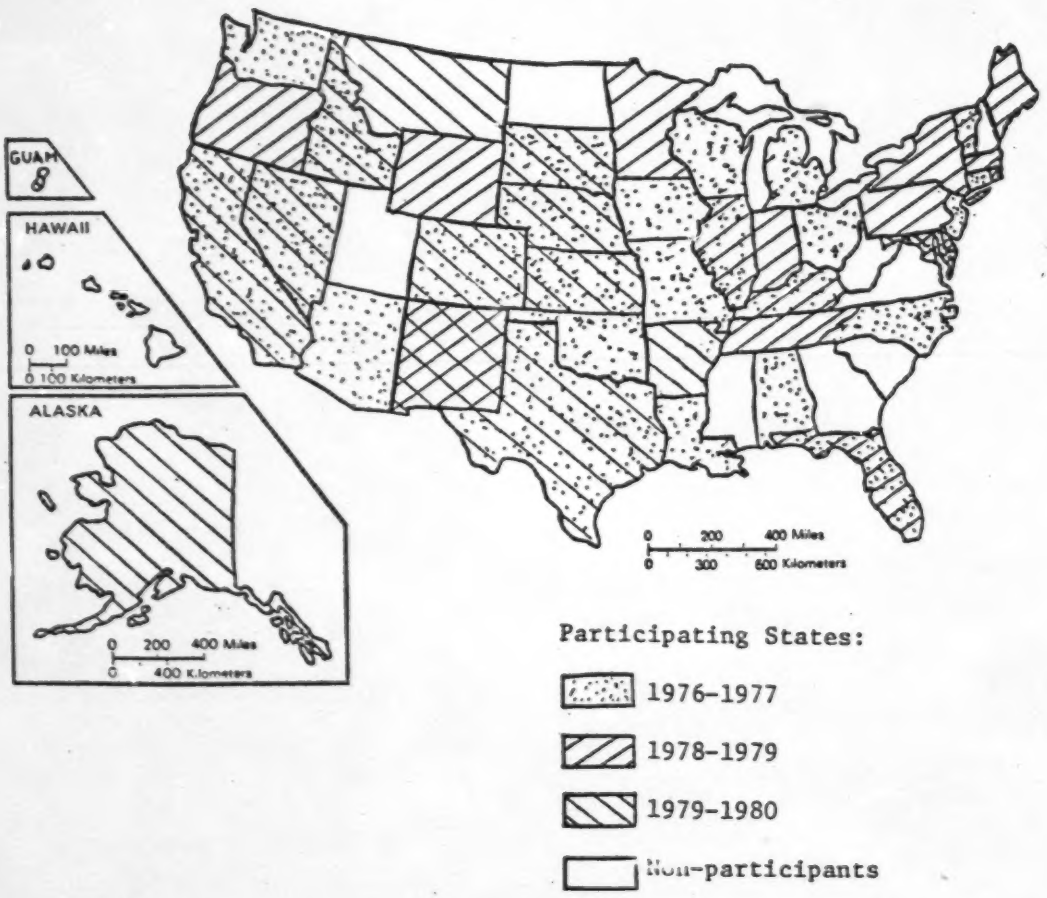
In addition, each Institute had goals and objectives to meet particular needs that were identified in the field during the planning stages of the individual Institutes. For example, in Institute I the participants developed an evaluation instrument for continuing education programs; Institute II had a particular concern for the development of criteria for quality for continuing education programs, and for a provider approval system; Institute III had special emphases on the management of statewide systems and on delivery systems for continuing education.

WHO CAME?

Forty-one, or 82 per cent, of the 50 states, plus Guam, participated in one or more of the Institutes. Twenty-six states were represented at the first Institute; sixteen at the second; and thirteen states and one U. S. territory--Guam--at the third. Institute I called for all participants to be members of state library agencies and six library educators were invited to serve as resource leaders. Institute I participants suggested that cooperative statewide planning would be better served if states participated in teams of three--with each state sending one person from a state library agency, a library education program, and a library association. Thus a state team pattern emerged in the two subsequent Institutes.

FIGURE I

STATES PARTICIPATING IN THE THREE CLENE/USOE INSTITUTES ON CONTINUING EDUCATION FOR LIBRARY·INFORMATION·MEDIA PERSONNEL



Budget limitations determined the number of participants and, unfortunately, all three of the Institutes had state applicants who could not be accommodated.

Figure I shows the states which participated in all three of the Institutes. One state, Maryland, was represented at all three Institutes. Twelve states participated in two of the Institutes.

WHAT WAS THE FORMAT?

Each of the three year-long Institutes provided a five day workshop at the site of a state library. The first was in Springfield, Illinois; the second at Albany, New York; and the third at Santa Fe, New Mexico. Meetings of the participants were also held each year during ALA Midwinter and during the ALA Annual Conference. After the workshop there was follow-up on progress of state plans by correspondence and telephone. Institute III had the distinction of having *ALL* the states participating turning in a whole or partial state continuing education plan by the close of the workshop period. Institute III also had a special meeting for participants during the Association for Educational Communications and Technology (AECT) meetings in Denver, Colorado on the theme, *Educational Applications of Satellite Technology*. This meeting resulted from the request of participating teams to hold a postworkshop meeting in the West. Institute III gave priority to western state participation; hence, all teams except one were western states.

At the final meeting of each Institute year, participants were given certificates from CLENE for five Continuing Education Units (CEU's). The Institute III group also had the option of having this record entered in CLENE's Voluntary Continuing Education Recognition System.

One strong feature of all three Institutes was the dedicated and creative leaders who served as members of the Advisory Committees--fifteen different individuals served on Advisory groups. Each Institute had one carry-over person from the previous group. This practice provided continuity and also ensured that experience from the preceding Institute was incorporated into the next. Seven state librarians were among the group: Kathryn J. Gesterfield (Illinois); Helen M. Miller (Idaho); Joseph F. Shubert (Ohio and New York); Nettie B. Taylor (Maryland); Patricia Klinck (Vermont); Anne Marie Falsone (Colorado); Clifford E. Lange (New Mexico). State Library Agencies were also represented by Andrea Hawkins, Chief, Consultant Services, Washington State Library, and Carmela Ruby, Library Consultant, California State Library.

Library educators represented on the Advisory Boards were: Gary R. Purcell of the Graduate Library School of the University of Tennessee; Lucille Whalen, School of Library and Information Science, State University of New York, Albany; Bernard Franckowiak, School of Librarianship, University of Washington;[1] Margaret K. Goggin, Graduate School of Librarianship, University of Denver. Library Association representatives were: Johnnie Givens, Southeastern Library Association, 1978-1979, and James A. Nelson, President of CLENE, 1979-1980.

IMPACT

As a result of the three Institutes there is considerable evidence that state library agencies are playing an increasingly central role in the development and provision of continuing education offerings for the library profession. In his "Introduction" to the *Library Trends* issue entitled "State Library Development Agencies," John A. McCrossan states:

> Many state library agencies are now calling library leaders together to plan coordinated, statewide continuing education programs for all types of librarians. This work is the direct result of planning for statewide continuing education programs which was sponsored by the Continuing Library Education Network and Exchange (CLENE).[2]

In reporting on her survey of the status of continuing education in state library agencies, Taylor noted that CLENE activity had been instrumental in providing "the impetus for

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[1] Midway through the 1979-80 Institute Dr. Franckowiak became Dean of the Graduate School of Librarianship, University of Denver, upon the retirement of Dr. Goggin from that position.

[2] John A. McCrossan, "Introduction," Library Trends 27 (Fall 1978), 112.

renewed continuing education at the state level." This concept was expressed by an Institute I participant this way:

> In our state we had people ready and willing to plan, develop, and implement continuing education opportunities, but it took this Institute to provide the motivation to spark our state into action.[1]

A chief goal of each Institute was for states to produce written statewide continuing education planning documents. By the end of each Institute year this goal was accomplished by each state participating in the Institute. One of the most encouraging features of the 1979-1980 Institute was that each participating state had produced *an action plan* before the end of the workshop phase in the Fall of the Institute year.

It is clear from information gathered from follow-up phone calls, correspondence, samples of state team accomplishments, and document exchanges that the Institute programs had a great and positive influence in motivating participating states to strengthen continuing education efforts for all those who work in and with libraries--statewide. In the process, states became aware of the need to develop their own statewide planning strategies for continuing education in accordance with their own unique needs. They learned that there is no one plan that is appropriate for all states, and that there are probably as many patterns as there are states. A common denominator discovered by all participants, however, was that the needs for continuing education are enormous, and although progress has been made by institute participants, there is still a huge amount to be accomplished. One of the participants stated that this realization "may be one of the most exciting things that has come up in librarianship in a long time."

Horizons have been broadened by the Institute experiences. Participants got out of "ruts" they might have been in and were motivated to try innovative approaches to continuing education planning. They saw the necessity of re-examining short-term and long-range goals and objectives of state and Federal programs to ensure that all individuals and groups are invited to

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[1] Nettie B. Taylor, "The Role of State Library Agencies in Continuing Education," Library Trends 27 (Fall 1978), 194.

participate in the statewide planning effort--not just librarians, but trustees, lay officials, all those involved as resource people, funding sources, and users.

The value of sharing ideas and experiences with participants in other states during and after the Institutes is one of the single greatest benefits of the programs. Uniformly, the participants indicated that they wished to increase regular communication among state library agency personnel, library educators, library associations, and other state agencies. Some of the most valuable post-Institute support for the participants in their daily jobs has come from continuing interpersonal contacts made during the Institutes.

LOOKING TO THE FUTURE

The total impact and influence of these three Institutes have reinforced the original hypothesis on which CLENE planned the first Institute, namely that the leadership of state library agencies is a crucial factor in the improvement of continuing education for the profession. Experience with the Institutes also made it very clear, as stated by Nettie B. Taylor, that:

> State library agencies perform many functions unique in the field of library services that may differ from the general library education and experience acquired in the field. There is a need for highly qualified persons to have ... additional training and experience ... in order to be capable of assuming State library agency responsibilities.[1]

Therefore, a proposal was submitted to the Office of Education proposing a Post-Master's State Library Services and Management Program: A Traineeship for Library Professionals. The plan included a post-master's curriculum designed to train future state library personnel for the special demands of state librarianship and a structured clinical experience for trainees in state library agencies.

Writing in support of the traineeship, William Asp, Chairman of the Chief Officers of State Library Agencies, stated:

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[1] Letter from Nettie B. Taylor, Assistant State Superintendent for Libraries of Maryland, to Elizabeth W. Stone, February 6, 1980.

> As you know, state library agencies have grown in importance, particularly in the last twenty years, as the centers of statewide planning and development of library services. State library agencies, in addition to offering a variety of services and consultant assistance to libraries in the state, are also increasingly involved in coordinating cooperative arrangements among libraries of all types within the state, as well as interlibrary relationships among states and state/federal relationships. Effective performance of those responsibilities demands capable, trained staff. Presently, I am aware of no educational program providing opportunities specifically addressing the needs of state library agency personnel.[1]

Similarly, Fred Glazer, West Virginia State Librarian, expressed the need for such training in the following manner:

> We have been concerned for many years over the recruitment of future cadres to replace positions, not only in our state library but in other state library agencies as well. I myself have traveled to several states speaking to graduate students and state agency sponsored seminars, trying to give an insight into the specialization that is state agency work. Any training which would incorporate practical field experience and viewpoints from state agency administration would certainly fill an obvious void in library education.[2]

Although this traineeship was not granted for 1980-1981, it is hoped that funds will be found at a later date to start a pattern of such traineeships on a regular basis as a source for strong, mature, specially trained personnel for state library

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[1] Letter from William G. Asp, Chairman COSLA, to Elizabeth W. Stone, February 4, 1980.

[2] Letter from Frederic J. Glazer, Director, West Virginia Library Commission, to Elizabeth W. Stone, February 1, 1980.

development programs--personnel who will understand that continuing education--even though it is a big part--is only one part of the total library program for a state. Continuing education is not an end in itself; it is a means to achieve quality library service for the public.

> Keep your eye on the ultimate objective. The continuing education program supports the library development program which, in turn, supports library service to the people.[1]

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[1] Joseph F. Shubert, "What's It Like in the Real World?" (Keynote address, November 12, 1976, to participants in the 1976-1977 Institute).

APPENDIXES

INSTITUTE ADVISORY BOARD

Clifford E. Lange, Ph.D. (Chairman)
State Librarian
New Mexico State Library

Anne Marie Falsone, Assistant Commissioner
Colorado State Library

Bernard Franckowiak, Ph.D., Associate Professor
School of Librarianship
University of Washington

Johnnie Givens
Library Consultant

Margaret K. Goggin, Ph.D.
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California State Library

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Graduate School of Library Science
Rosary College

Kathleen Weibel, Continuing Education Consultant
New York State Library

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Mary Baxter
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Carolyn C. Hardin
Institute Secretary

CLENE

CONTINUING LIBRARY EDUCATION NETWORK & EXCHANGE

ANNOUNCES

An Institute for Continuing Education Leaders:

- *State Library Agency Personnel*
- *Library Educators*
- *Library Association Leaders*

STATEWIDE SYSTEMS OF CONTINUING EDUCATION:

NEW DIRECTIONS

A U.S.O.E. GRANT FOR 1979-1980

APPENDIX A

MORE ABOUT THE INSTITUTE

This Institute is a *leadership training* opportunity for teams of key personnel responsible for library·information·media continuing education in their states. Applicants must be nominated by the Chief Officer of the State Library.

One major goal of the Institute is to:

Facilitate the development of statewide coordinated systems of continuing education for personnel in the library.information. media professions.

State planning teams will develop *Action Items* for integrating continuing education planning into the State Library development plan. This will occur during a workshop week in Santa Fe, New Mexico, November 8 through 13. Management skill training sessions will be provided at the workshop. Participants will carry out *Action Items* during the Institute year.

The second major goal of the Institute is to:

Expose teams to innovative continuing education concepts and methodologies, which may be applied in the states' planning for coordinating continuing education statewide.

Continuing Education topics will be covered during the workshop and Continuing Education document exchanges will occur throughout the year.

CRITERIA FOR PARTICIPATION

The Institute Advisory Board established the following criteria and guidelines for selection of applicants to participate in the 1979-1980 Continuing Education Institute:

- The Institute will emphasize a team approach to planning continuing education in each state; therefore, priority is given to state applications which nominate a three person team, representing the

  1) State Library
  2) Library·Information·Media educational programs in the state
  3) The state's Library·Information·Media professional associations

- Chief Officers of State Library Agencies are responsible for assembling the teams and may be members of the teams representing their state or territory.

- Applications are welcome from all states and territories; however, priority will be given to state applications from the Western United States.

- Team members should be from agencies or organizations committed to continuing education and capable of following through on commitments.

- Team members are expected to attend the entire 5 day workshop phase of the Institute, scheduled for November 8-13, 1979 in Santa Fe, New Mexico. If possible, teams are to attend the 1980 January and June CLENE Institute follow-up meetings.

STIPEND FOR PARTICIPANTS

Participants will receive a $75.00 stipend to help defray some of the costs of the workshop week.

1979-1980

CLENE/USOE INSTITUTE

"STATEWIDE SYSTEMS OF CONTINUING EDUCATION: NEW DIRECTIONS"

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1979-1980

CLENE/USOE INSTITUTE

"STATEWIDE SYSTEMS OF CONTINUING EDUCATION: NEW DIRECTIONS"

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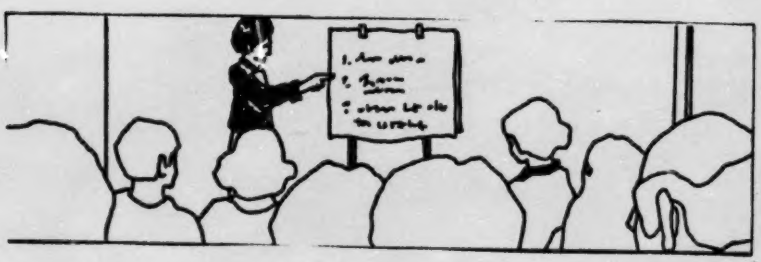

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"STATEWIDE SYSTEMS OF CONTINUING EDUCATION: NEW DIRECTIONS"

1979 - 1980 Institute

Post Workshop Meeting #1

January 21, 1980

Chicago, Illinois

AGENDA

8:00 - 8:15 P.M.	Assemble informally
8:15	Welcome, Introductions
8:20 - 9:30	Program -- "Self-Assessment: Methods for Trainers" Deanna Marcum, Association of Research Libraries, Office of Management Studies
9:30 - 10:00	State Team Issues
	-- State team monthly reports -- Eleanor Biscoe
	-- Recognition Systems (ACT National Registry) Elizabeth Stone
	-- Evaluation -- Muriel Howick
	-- Issues identified by State Teams

This program is being held in conjunction with the annual Conference of the American Library Association (ALA).

"STATEWIDE SYSTEMS OF CONTINUING EDUCATION:

NEW DIRECTIONS"

1979-1980 Institute

funded by

U. S. Office of Education

NEW YORK, NEW YORK

Studio H

The Barbizon Plaza Hotel

Saturday, June 28, 1980

AGENDA

I.	Breakfast	8:00
II.	Program	8:30
III.	Institute Business Meeting	9:30

PROGRAM

"Hitherto and Henceforth:

Making Tomorrow Happen"

SPEAKER

William G. Asp, Director
Office of Public Libraries
and
Interlibrary Cooperation

and

Chairman, Chief Officers
of
State Library Agencies (COSLA)

This program is being held in conjunction with the annual meeting of the Association for Educational Communications and Technology (AECT)

"STATEWIDE SYSTEMS OF CONTINUING EDUCATION:

NEW DIRECTIONS"

1979-1980 Institute

funded by

U.S. Office of Education

DENVER, COLORADO

The Biltmore Room of the

Hilton Hotel

Tuesday, April 22, 1980

AGENDA

I.	*Program*	*2:00-3:30*
II.	*Institute Business Meeting*	*3:30-4:00*
III.	*Social Hour and Dinner with Institute Colleagues and Friends (time and location to be announced)*	

PROGRAM

"The Satellite Era of Continuing Education"

-History of Educational Satellite Use

-Programming via Satellite

-Future of Application of Satellite Technology to Continuing Education

SPEAKER

Rick Williamson, Media Director
Bethany College, West Virginia

SANTA FE WORKSHOP PROGRAM CONTRIBUTORS

DAY 1

Johnnie Givens
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Participant Program: "Prescription for Situation Downtime: Colleague SSS"

DAY 2

Roderick G. Swartz
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Washington State Library
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Keynote Speech: "Continuing Education in Context"

Brooke Sheldon
Director, School of Library Science
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Denton, Texas 76203
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817-382-1614 (home)
Program: "Planning Models"

Carmela Ruby
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Planning Team Session

Frank Reinow, Training Manager
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President of ASTD Albuquerque
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American Society for Training and Development

DAY 3

John Bachmann, Director
Management Development Programs and Assistant Dean
College of Business, The University of Tennessee
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615-974-5001 (work)
Program: "Managing the Statewide Continuing Education Process"

SANTA FE WORKSHOP PROGRAM CONTRIBUTORS - continued

DAY 4

John Bachmann, Director
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and Assistant Dean
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Program: "Bridging the Gap Between Needs Assessment and Delivery of Continuing Education in your State"

Muriel Howick
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Program: "Evaluation"

DAY 5

Margaret K. Goggin
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Program: "Continuing Education Delivery Systems"

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Program: "Continuing Education Delivery Systems"

Glen Southworth, President
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Program: "Continuing Education in the Real World"
Program: "Quality Control of Continuing Education"
Program" "Your Role 'Back Home'"

Robert Jerkins
Personnel Services Coordinator
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"Personnel Problems in Implementing Continuing Education"
"How to Gain State and Local Support for Continuing Education Activities"

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"Western Council of State Library Agencies"

DAY 6

Anne Marie Falsone
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"Farewell to Santa Fe"

Clifford E. Lange, State Librarian
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"Listening Session"

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January 21, 1980

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"Self-Assessment: Methods for Trainers"

April 22, 1980

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Evaluator: Jean Connor, formerly Chief of Library Development, New York State Library
Consultant: Brooke Sheldon, Dean, School of Library Science, Texas Woman's University, Denton, Texas
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Ex-Officio to the Board: Dr. Ruth Patrick, library educator and 1976-1977 President of CLENE; Dr. Gary Purcell, representative from the Advisory Committee of the Recognition and Prototype Home Study CLENE/USOE project; Dorothy Deininger, Principal Investigator of the Recognition and Home Study Project; and Evaluator Jean Connor, as well as the Staff personnel.

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Alvin Goldwyn: Professor, School of Library Science, Case Western Reserve University.

Observer: Mary Power: Executive Director, Association of State Libraries, American Library Association.

Funding Source: United States Office of Education, Division of Library Programs, Office of Libraries and Learning Resources from Title II-B of the Higher Education Act, as amended.
Funding Amount: $25,000.00
Dates: June 25, 1976 - June 30, 1977.
Number of States Participating: 26

LEADERSHIP OF "STATEWIDE SYSTEMS OF CONTINUING EDUCATION: NEW DIRECTIONS" 1978-1979

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Funding Amount: $43,979.00
Dates: July 1, 1978 - June 30, 1979
Number of States Participating: 16

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Funding Amount: $55,000.00.
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Number of States Participating: 13, plus 1 Territory.